Phone Manager User Guide

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USER GUIDE

Mitel

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1 Overview

Phone Manager is designed to make using your Mitel MiVoice Office 250 handset as easy as possible. This document is designed to outline the features of Phone Manager and help you get the most out of the product.

Phone Manager requires an instance of Mitel Communication Service (MCS) with the Application Server role supporting Phone Manager clients, installed and running on the Local Area Network (LAN). The licensing for the product and many of the features is controlled via the Application Server so you may need to contact your IT department or phone system supplier for help should any of the features described in this document require a license.

Phone Manager runs in a Microsoft ® Windows environment and is designed to improve your productivity by integrating the use of your MiVoice Office 250 phone with your PC and the various software applications you use to function well within your team.

1.1 Requirements

Overview

The system requires specific information and requirements to be met for any installation. Read each of the sections and ensure that the information requested is available prior to an installation.

System Requirements

To be able to install and run Phone Manager the client computer needs to meet the following **minimum** requirements. If installing into a multi user environment where multiple instances of the client will be running, for example Microsoft Terminal Service, Citrix etc. then see the Multi User Computer Requirements section.

Operating Systems

- Windows 7 Pro/Enterprise/Ultimate 32-bit/64-bit
- Windows 8 Pro 32-bit/64-bit
- Windows 8.1 Pro 32-bit/64-bit
- Windows 2008 SP2 Standard/Enterprise/Datacenter 32-bit/64-bit
- Windows 2008 R2 Standard/Enterprise/Datacenter 32-bit/64-bit
- Windows 2012 Standard/Datacenter 64-bit
- Windows 2012 R2 Standard/Datacenter 64-bit

> The Windows 2008 or Windows 2008 R2 Server Core installation options are not supported.
>
> The Windows 2012 Foundation and Essential versions are not supported.

Hardware Requirements

The minimum recommended hardware is dependent on the number of devices configured on the PBX and the number of clients that will be connected.

Processor	Intel Core 2 Duo 1.8GHz or faster processor (or equivalent)
Memory	Minimum: 1GB RAM Recommended: 2GB RAM or more When Phone Manager is running it will use a minimum of 70MB of RAM per client - this can be significan more depending on configuration and number of devices and/or users on the system.
Network	IPv4, 100Mb / 1Gb LAN
Hard Disk	Minimum: 20GB free space
Video	Minimum: DirectX v9 compatibly graphics cards with 120MB RAM Recommended:DirectX v9 compatibly graphics cards with 1024MB RAM

Software Requirements

The following software is required to be installed.

- .NET Framework 3.5 SP1
- .NET Framework 4.0 Full
- Windows Installer 4.5

Multi Users & Virtual Desktop System Requirements

Phone Manager can be run in multi user and virtual desktop environments such as Microsoft Terminal/Remote Desktop Services, Citrix XenApp or VMWare Virtual Desktop Infrastructure (VDI) with the following limitations:

- The 1st Party TAPI drivers is not supported

- Phone Manager Softphone is not supported

When deploying in these environments then the amount of memory, CPU usage and Video resource that Phone Manager will use needs to be determined. As the resources required are dependent on configuration and the number of devices and Users in the system then this needs to be benchmarked first to ensure the number of concurrent Users can be supported on the hardware available.

1.2 Licensing

Phone Manager is available in several different license levels. When you connect to the Communication Service a license will be assigned to you based on the *Client Profile* assigned to your User account on the server.

- Outlook Features: As well as Standard features, adds the additional functionality of screen popping and populating call history journal inside Microsoft Outlook as well as dialling contacts and auto-creating MiVoice Office 250 Meet Me Conference appointments.
- Professional Features: As well as Outlook license features, adds the additional functionality of integrating with many other CRM applications. Adds TAPI & .NET API access and supports custom Macro design.
- Team Leader Features**:** As well as Professional license features, adds the ability to silent monitor other users and control their ACD group status, DND and call forward status.

1.3 Configuration

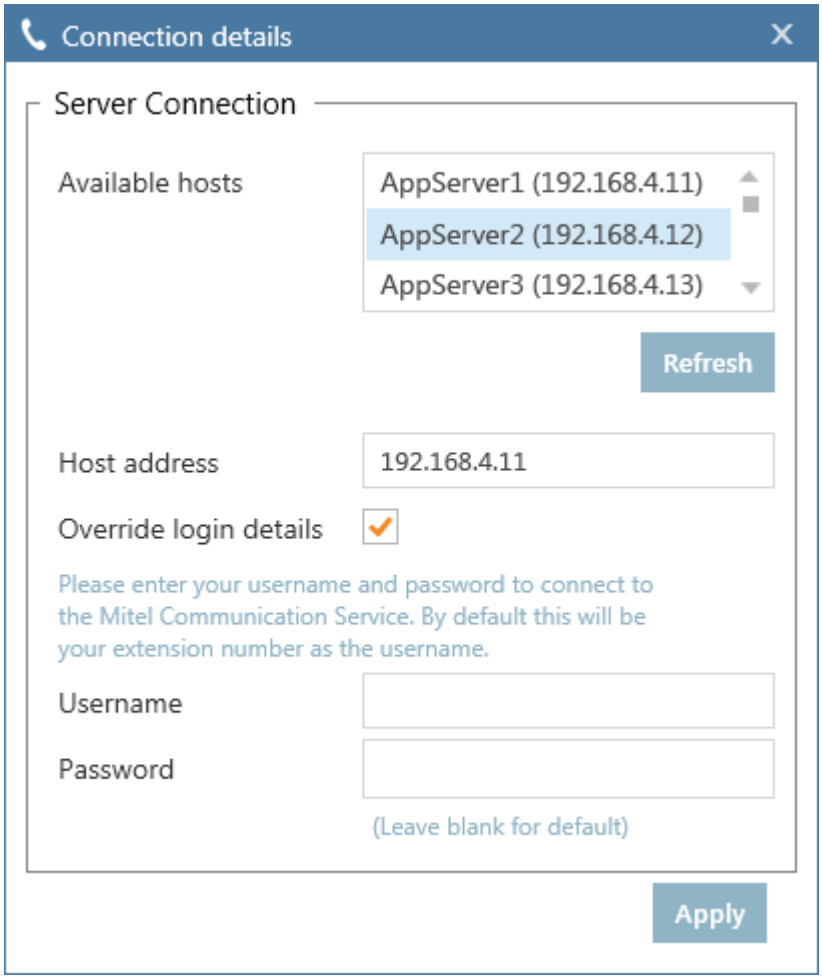
Connection Details

Phone Manager requires a basic level of configuration to get it connected to the Communication Service and controlling your extension. The following information is required when Phone Manager starts up:

Host address	This is the IP address or hostname of the server running the Communication Service software. Phone Manager will try and find this automatically on start-up. If it does not find an Communication Service or it finds more than one then some user interaction is required to confirm the connection details.
User Credentials	Phone Manager needs to connect to the Communication Service with a user account. By default, it will use the account you are logged into your PC with to authenticate. If you wish to override this you can do so in the Connection settings section.
Extension	Phone Manager requires the details of the extension you are using when it starts up so that it can show the correct call information. There are several of ways of providing Phone Manager with this information. Please read through the Connection settings section for more details.

Server Connection

The first time Phone Manager starts it will broadcast to find an Communication Service instance running. If it doesn't find one or if it finds more than one, the window below will be shown.



Either select the correct server from the **Available hosts** list or enter the IP address or hostname of the server you wish

Phone Manager to connect to in the **Host address** field.

When Phone Manager starts it will use the Windows account details of the current logged in user. If this is not appropriate then check the **Override login details** and enter the **Username** and **Password** to use instead. (This might be necessary if for example you connect to the office from your home PC).

If the User account is linked to an Microsoft Active Directory User account then enter the username in the DOMAIN\User format, otherwise use the username and password provided by your administrator. By default the username is your extension number and leave the password blank to use the default value.

2 Outlook Features

The following section covers the features that are available in the Microsoft Outlook licensed version of Phone Manager. The specific Microsoft Outlook features that are provided are:

Call Control	How to make and transfer calls. How to handle multiple calls and tell the difference between different types of call.
Endpoint Control	Controlling the state of your endpoint. Forward states, Do Not Disturb and ACD Agent control. Volume Control and Voicemail access.
Contacts	View the status of other users within the organization. Searching for internal and external contacts and using the contacts view to manage favorites and speed up communications.
Call History	Track all calls you make on the system and optionally play them back (requires Call Recording integration license).
Chat	Communicate with other users inside the organization using chat/instant messaging.
Directory Integration	Outlook contacts can be linked into the Phone Manager directory and displayed on the toaster.
Screen Popping	Outlook contacts can be screen popped.
Call History	Outlook contacts can have call history (journal entries) created.
Calendar / DND Synchronization	Outlook calendar can be used to automatically synchronize the User's DND state with their calendar items.

This license also provides:

Hot Keys	Configure global hotkeys to automate common telephony tasks.
Call Banner Profiles	Toaster support for custom banner profiles.
Softphone	Support for connecting as a softphone. (Requires a softphone license).
Integrated Toolbar	Only available when connected as a softphone. This provides 5 buttons that can be customized on the main window.

2.1 Call Control

Overview

Making and receiving calls is obviously the primary purpose of a telephone. Phone Manager makes this process as simple and efficient as possible, providing you with context sensitive action buttons and giving you all the information you need about the calls you are on.

Making Calls	How to dial internal and external numbers.
Highlight & Dial	Dialling from within other applications.
Toaster	Seeing details about the call you are on and performing common tasks such as putting calls on hold, retrieving calls and clearing calls.
Transferring	Performing supervised/announced or direct transfers.
Multiple Calls	How to handle multiple calls at your endpoint.
Dial Pad	Dialing out with the dial pad or dialing DTMF digits over a call to navigate through an attendant or IVR.

Making Calls

Making a call to a number is a simple process that can be achieved a number of different ways.

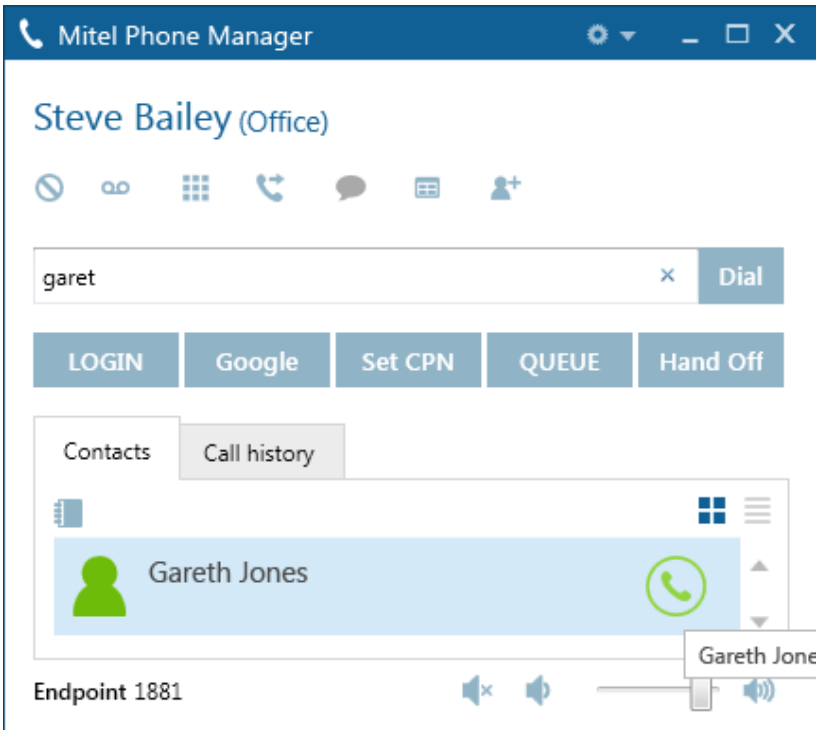
Dialling a number you know

If you know the number you wish to dial, whether it is another endpoint internally or an external number then simply enter the number into the dial text box and hit the enter key or press the 'Dial' button to make your endpoint dial the number.

If you are dialling an external number there is no need to worry about adding in any additional digits to get an outside line or worrying about area codes as this will be done automatically as per the configuration in the server.

Dialling from the contacts screen

If you want to dial another user within your organisation or a contact that is stored in a global or personal directory you simply need to click the dial icon next to their status icon on the contacts screen or double click the status icon itself. If the contact to dial is not currently visible start entering their name into the search window to bring up a list of matching contacts.



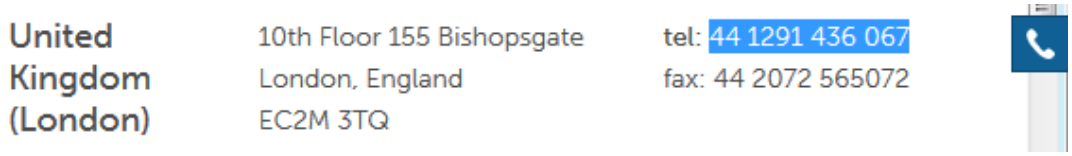
If you dial a contact while you are already on a call with someone else, Phone Manager will automatically set up a consultation/enquiry call for you.

Highlight & Dial

Dialling from another application (Highlight & Dial)

Often you will have the need to dial a number from another application. Commonly this will be a web page that you want to dial the contact details from or an email someone has sent you.

To do this you can use the Highlight & Dial features of Phone Manager. Simply highlight the number you wish to dial and then click on the Highlight & Dial button or use a Highlight & Dial hot key (See the Hot Keys section for details). You will find the Highlight & Dial button docked to the right-hand side of your screen.



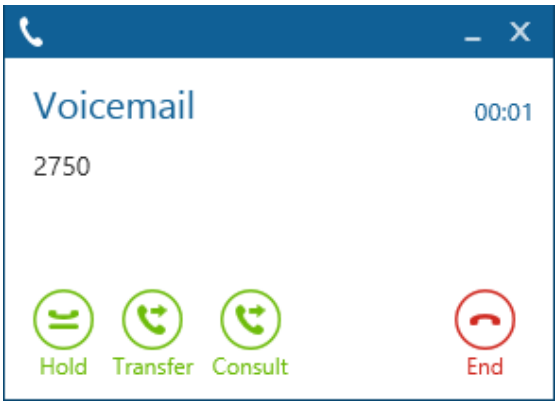
You can move the Highlight & Dial button up or down the screen to suit your requirements.

Generally as long as the number can be copied to and pasted from the Windows clipboard then this should work. This can be tested by highlighting the telephone number and pressing Ctrl+C and then opening Notepad and pressing Ctrl+V. If the number appears then the test was successful.

Some 3rd party applications can perform their own clipboard control causing highlight and dial to not function corr Testing with a Phone Manager client is recommended to ensure full compatibility.

Toaster

The toaster window will appear whenever a call is in progress at your endpoint. It is designed to give you all the details you need about the call in progress and provide you with context sensitive buttons to perform actions on those calls such as hold or retrieving a call.



Context Sensitive Buttons

The following buttons will appear at different times on the toaster depending on the status of the call.

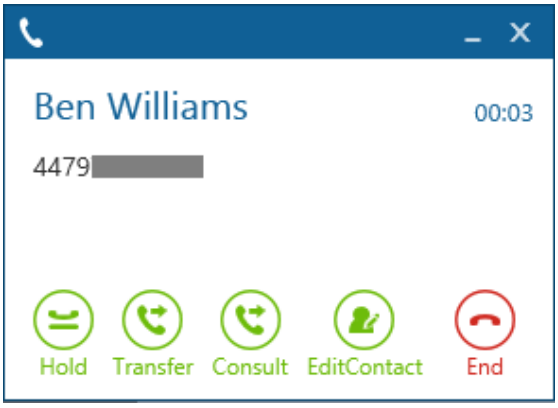
End	Use this button to hang up on a call. If you have the handset of the telephone in your hand you will be disconnected from th remote party and you will then receive dial tone from the telephone system.
Answer	Use this button to answer an incoming call.
Hold Retrieve	These hold and retrieve buttons will appear once a call is in progress. If you hold a call by pressing the hold button on the toaster or on the telephone itself, the hold button will be repl with a retrieve button to allow you to pick the call back up.
Divert	This option is displayed on incoming ringing calls. Use the divert to send an unwanted call t another destination.
Send to voicemail	This option is displayed on incoming ringing calls. Use the send to voicemail option to send unwanted call to your voicemail mailbox.
Transfer Consult	There are 2 ways of transferring a call to another location. Using the transfer option will mov call to another location immediately. The consultation option will allow you to speak to some at the other location first before putting the call through.
Complete Cancel	These options are available if you have set up a consultation call. To complete the transfer l up the handset of the telephone or press the complete button. To go back to the original cal press the cancel button.
Add Contact EditContact	These options allow you to add or edit the contact associated with the call in the local or glo directories.

Transferring

Transferring a call can be done in several different ways depending on whether you want to transfer an answered call directly (blind transfer) or by announced transfer. Alternatively if the call is ringing, then you can divert the call before answer.

Transfers

When connected to a call, context sensitive toaster action buttons appear to offer the user the system features that are possible at the time.



SIP Softphone does not support transferring a connected call straight to a Voicemail box

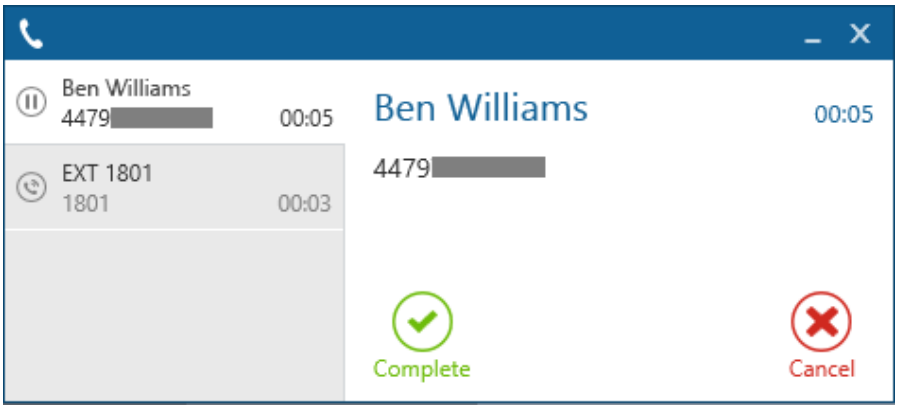
Direct Transfer

To perform a direct transfer where the call is sent to the transfer destination before the consultation call has been made click on the *Transfer* button and this will give focus to the main window with the cursor in the *Search or Dial* box. Search for the contact to transfer the call to and click on the dial button next to their icon (or highlight it and press *Enter)* or type in the number in the *Search or Dial* box and click on *Dial*. The call will then be sent straight to this contact and the call will clear from your endpoint.

Announced Transfer

To perform an announced transfer a consultation call needs to be set up before transferring the call. Whilst on a call click on the *Consult* button and this will give focus to the main window with the cursor in the *Search or Dial* box, or go direct to the main window and find the contact, or use the hot key for *Directory Search*. Use any of these methods to find the contact to transfer the call to in the main contact window.

Once the contact has been found dial them and this will set up the consultation call. For example this shows a consultation call made to endpoint 1801.

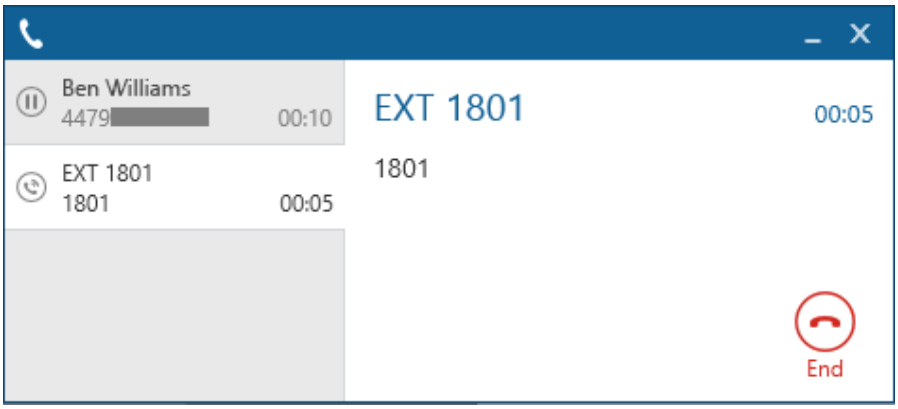


As there are multiple calls at the endpoint now the summary panel appears to the left of the toaster. This shows all the calls at the current endpoint and clicking on each call will update the details on the right hand side with the relevant information for the call selected.

The consultation call has not been answered yet but the transfer can be completed at any time by clicking on the *Complete* button.

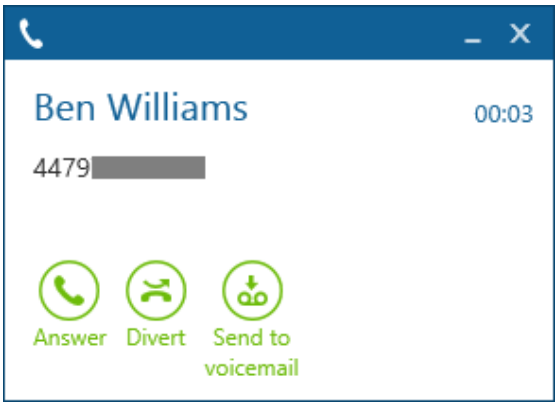
To cancel the consultation call and not perform the transfer to this contact, click on the *Cancel* button (shown above). This will then clear the consultation call and connect you back to the original call.

Alternatively swap over to the enquiry call and click on the *End* button shown below. This will cause the original call to be left on hold and would need to be manually retrieved.



Divert

When a call is ringing the toaster action buttons change to reflect what you can do with this call.



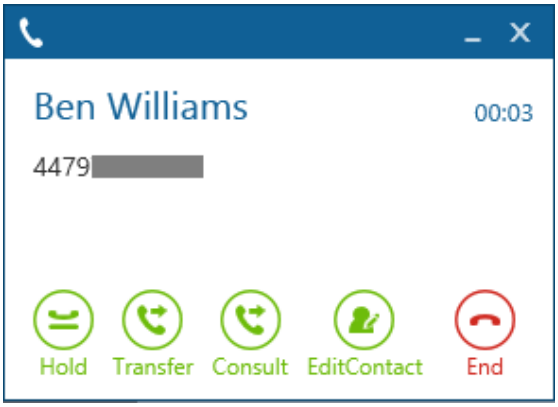
To divert a call click on the *Divert* button and this will give focus to the main window with the cursor in the *Search or Dial* box. Search for the contact to divert the call to and click on the dial button next to their icon (or highlight it and press *Enter)* or type in the number in the *Search or Dial* box and click on *Dial*. The call will then be sent straight to this contact and the call will clear from your endpoint.

The toaster also provides a *Send to voicemail* button that enables a single click divert of a call to voicemail.

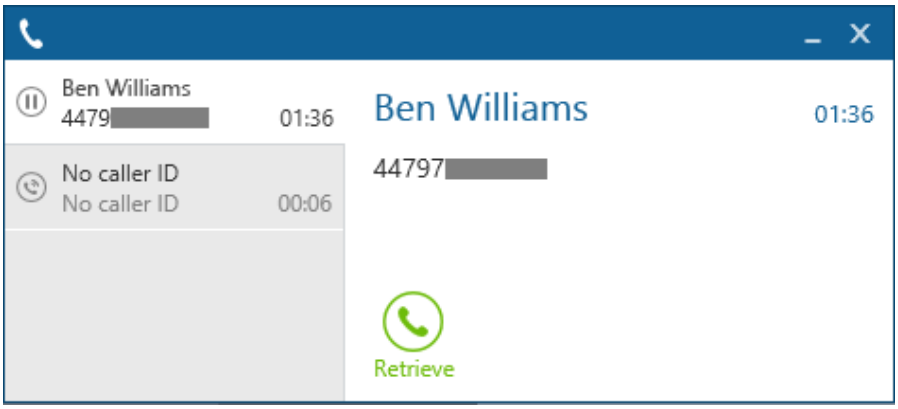
Multiple Calls

The toaster pop up will show multiple calls at an endpoint by expanding to the left with a summary pane that lists all of the calls in progress. Clicking on the entry for a specific call will update the details on the right hand side with the relevant information for the call selected.

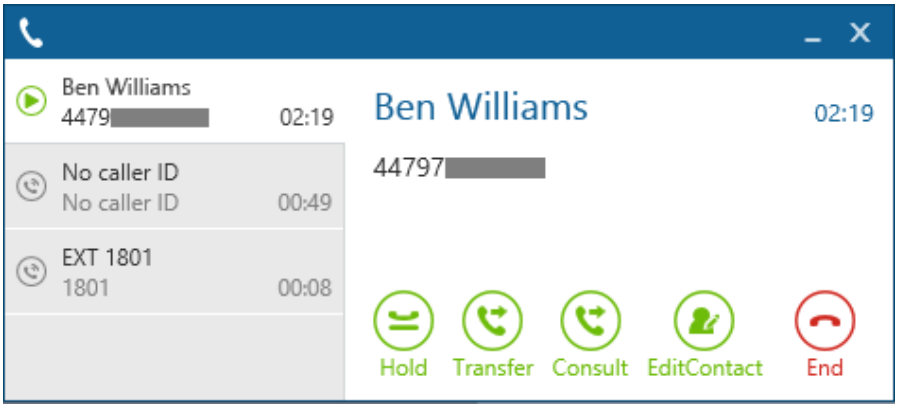
For a single call the toaster will be shown without the summary pane.



If a second call comes in the then toaster will expand with the summary pane. This example shows the first call on hold and the second call is ringing.



If a third call comes in then this gets added. In this example the first call is connected and the second and third calls are ringing.



Next to each call in the summary pane the icon to the left reflects the state of the call.

	Call connected
	Call ringing
	Call on hold

Dial Pad

	The dial pad can be used for dialling numbers or for navigating Auto Attendants or Interactive Voice Response (systems. The dial pad can be loaded by clicking the dial pad icon from the main window.

The dial pad window will then load as shown.

Clicking on any of the buttons will send the DTMF digit to the phone whilst on a call.

In order to ensure that the normal use of numeric keys on your PC doesn't interfere with a call, DTMF tones will o sent over a call whilst the Dial Pad is visible.

2.1.1 Making Calls

Making a call to a number is a simple process that can be achieved a number of different ways.

Dialling a number you know

If you know the number you wish to dial, whether it is another endpoint internally or an external number then simply enter the number into the dial text box and hit the enter key or press the 'Dial' button to make your endpoint dial the number.

If you are dialling an external number there is no need to worry about adding in any additional digits to get an outside line or worrying about area codes as this will be done automatically as per the configuration in the server.

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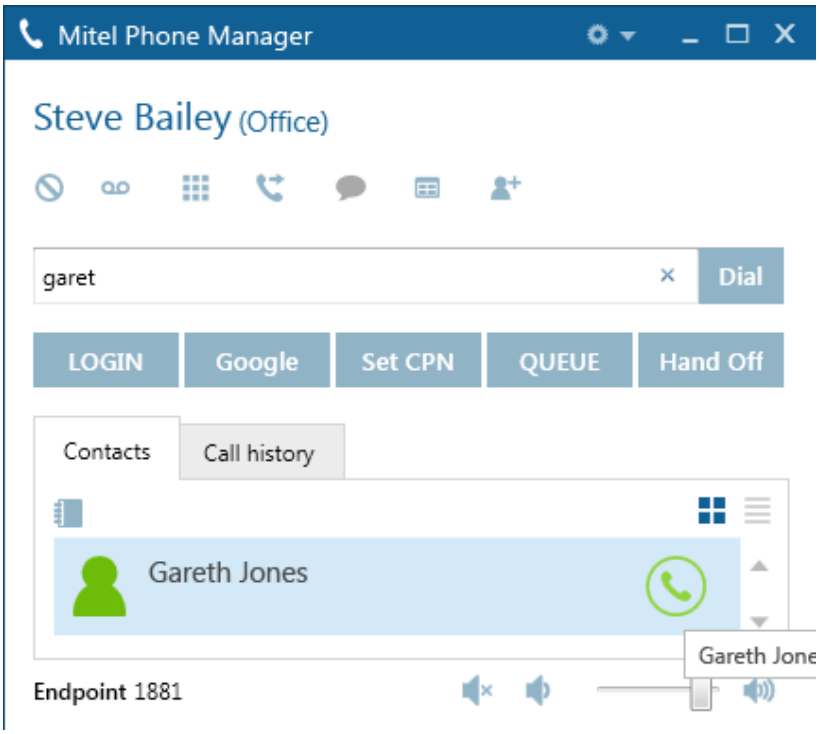
If you want to dial another user within your organisation or a contact that is stored in a global or personal directory you simply need to click the dial icon next to their status icon on the contacts screen or double click the status icon itself. If the contact to dial is not currently visible start entering their name into the search window to bring up a list of matching contacts.



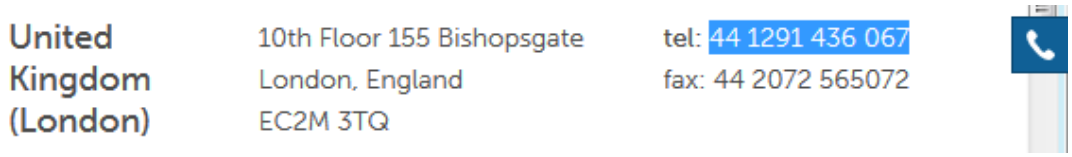
If you dial a contact while you are already on a call with someone else, Phone Manager will automatically set up a consultation/enquiry call for you.

2.1.2 Highlight & Dial

Dialling from another application (Highlight & Dial)

Often you will have the need to dial a number from another application. Commonly this will be a web page that you want to dial the contact details from or an email someone has sent you.

To do this you can use the Highlight & Dial features of Phone Manager. Simply highlight the number you wish to dial and then click on the Highlight & Dial button or use a Highlight & Dial hot key (See the Hot Keys section for details). You will find the Highlight & Dial button docked to the right-hand side of your screen.



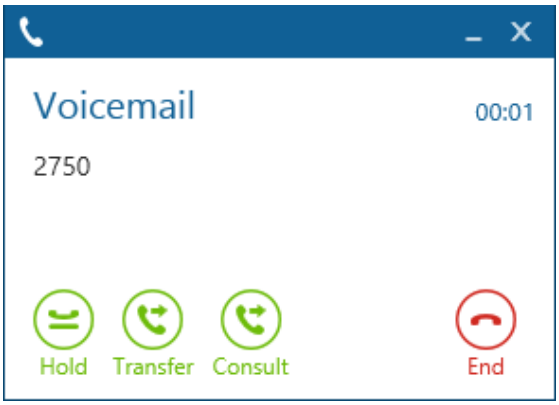
You can move the Highlight & Dial button up or down the screen to suit your requirements.

Generally as long as the number can be copied to and pasted from the Windows clipboard then this should work. This can be tested by highlighting the telephone number and pressing Ctrl+C and then opening Notepad and pressing Ctrl+V. If the number appears then the test was successful.

> ⚠ Some 3rd party applications can perform their own clipboard control causing highlight and dial to not function corr
> Testing with a Phone Manager client is recommended to ensure full compatibility.

2.1.3 Toaster

The toaster window will appear whenever a call is in progress at your endpoint. It is designed to give you all the details you need about the call in progress and provide you with context sensitive buttons to perform actions on those calls such as hold or retrieving a call.



Context Sensitive Buttons

The following buttons will appear at different times on the toaster depending on the status of the call.

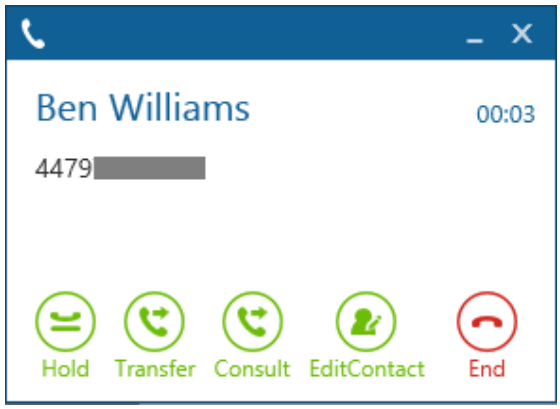
	Use this button to hang up on a call. If you have the handset of the telephone in your hand you will be disconnected from th remote party and you will then receive dial tone from the telephone system.
	Use this button to answer an incoming call.
	These hold and retrieve buttons will appear once a call is in progress. If you hold a call by pressing the hold button on the toaster or on the telephone itself, the hold button will be repl with a retrieve button to allow you to pick the call back up.
	This option is displayed on incoming ringing calls. Use the divert to send an unwanted call t another destination.
	This option is displayed on incoming ringing calls. Use the send to voicemail option to send unwanted call to your voicemail mailbox.
	There are 2 ways of transferring a call to another location. Using the transfer option will mov call to another location immediately. The consultation option will allow you to speak to some at the other location first before putting the call through.
	These options are available if you have set up a consultation call. To complete the transfer l up the handset of the telephone or press the complete button. To go back to the original cal press the cancel button.
	These options allow you to add or edit the contact associated with the call in the local or glo directories.

2.1.4 Transferring

Transferring a call can be done in several different ways depending on whether you want to transfer an answered call directly (blind transfer) or by announced transfer. Alternatively if the call is ringing, then you can divert the call before answer.

Transfers

When connected to a call, context sensitive toaster action buttons appear to offer the user the system features that are possible at the time.



⚠ SIP Softphone does not support transferring a connected call straight to a Voicemail box

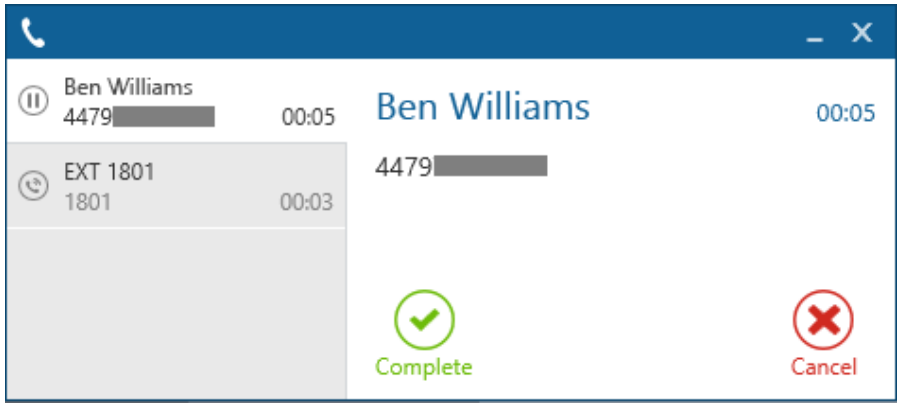
Direct Transfer

To perform a direct transfer where the call is sent to the transfer destination before the consultation call has been made click on the *Transfer* button and this will give focus to the main window with the cursor in the *Search or Dial* box. Search for the contact to transfer the call to and click on the dial button next to their icon (or highlight it and press *Enter)* or type in the number in the *Search or Dial* box and click on *Dial*. The call will then be sent straight to this contact and the call will clear from your endpoint.

Announced Transfer

To perform an announced transfer a consultation call needs to be set up before transferring the call. Whilst on a call click on the *Consult* button and this will give focus to the main window with the cursor in the *Search or Dial* box, or go direct to the main window and find the contact, or use the hot key for *Directory Search*. Use any of these methods to find the contact to transfer the call to in the main contact window.

Once the contact has been found dial them and this will set up the consultation call. For example this shows a consultation call made to endpoint 1801.



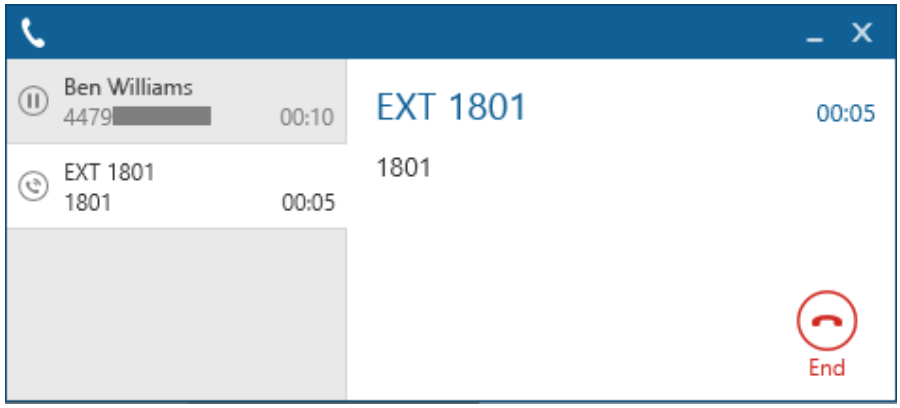
As there are multiple calls at the endpoint now the summary panel appears to the left of the toaster. This shows all the calls at the current endpoint and clicking on each call will update the details on the right hand side with the relevant information for the call selected.

The consultation call has not been answered yet but the transfer can be completed at any time by clicking on the *Complete* button.

To cancel the consultation call and not perform the transfer to this contact, click on the *Cancel* button (shown above). This will

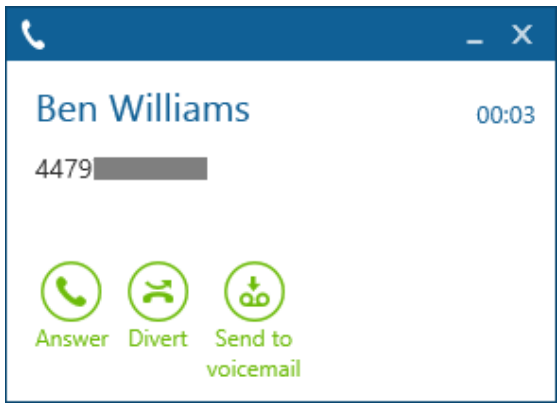
then clear the consultation call and connect you back to the original call.

Alternatively swap over to the enquiry call and click on the *End* button shown below. This will cause the original call to be left on hold and would need to be manually retrieved.



Divert

When a call is ringing the toaster action buttons change to reflect what you can do with this call.



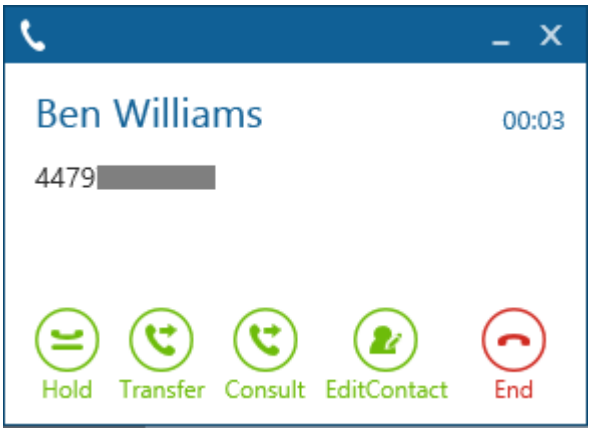
To divert a call click on the *Divert* button and this will give focus to the main window with the cursor in the *Search or Dial* box. Search for the contact to divert the call to and click on the dial button next to their icon (or highlight it and press *Enter)* or type in the number in the *Search or Dial* box and click on *Dial*. The call will then be sent straight to this contact and the call will clear from your endpoint.

The toaster also provides a *Send to voicemail* button that enables a single click divert of a call to voicemail.

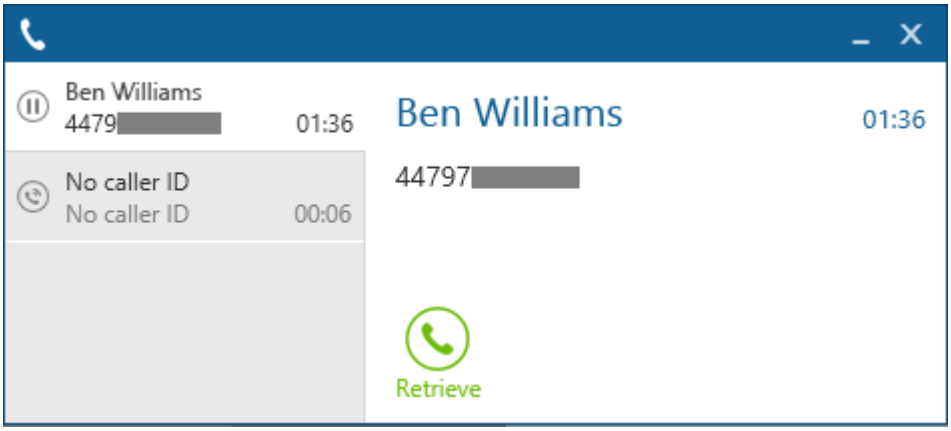
2.1.5 Multiple Calls

The toaster pop up will show multiple calls at an endpoint by expanding to the left with a summary pane that lists all of the calls in progress. Clicking on the entry for a specific call will update the details on the right hand side with the relevant information for the call selected.

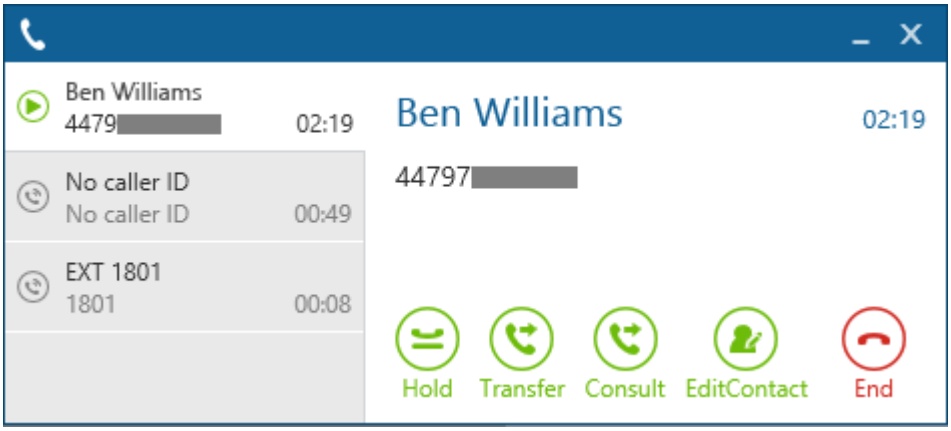
For a single call the toaster will be shown without the summary pane.



If a second call comes in the then toaster will expand with the summary pane. This example shows the first call on hold and the second call is ringing.



If a third call comes in then this gets added. In this example the first call is connected and the second and third calls are ringing.



Next to each call in the summary pane the icon to the left reflects the state of the call.

	Call connected
	Call ringing
	Call on hold

2.1.6 Dial Pad

	The dial pad can be used for dialling numbers or for navigating Auto Attendants or Interactive Voice Response (IVR) systems. The dial pad can be loaded by clicking the dial pad icon from the main window.

The dial pad window will then load as shown.

Clicking on any of the buttons will send the DTMF digit to the phone whilst on a call.

In order to ensure that the normal use of numeric keys on your PC doesn't interfere with a call, DTMF tones will only be sent over a call whilst the Dial Pad is visible.

2.2 Extension Control

Overview

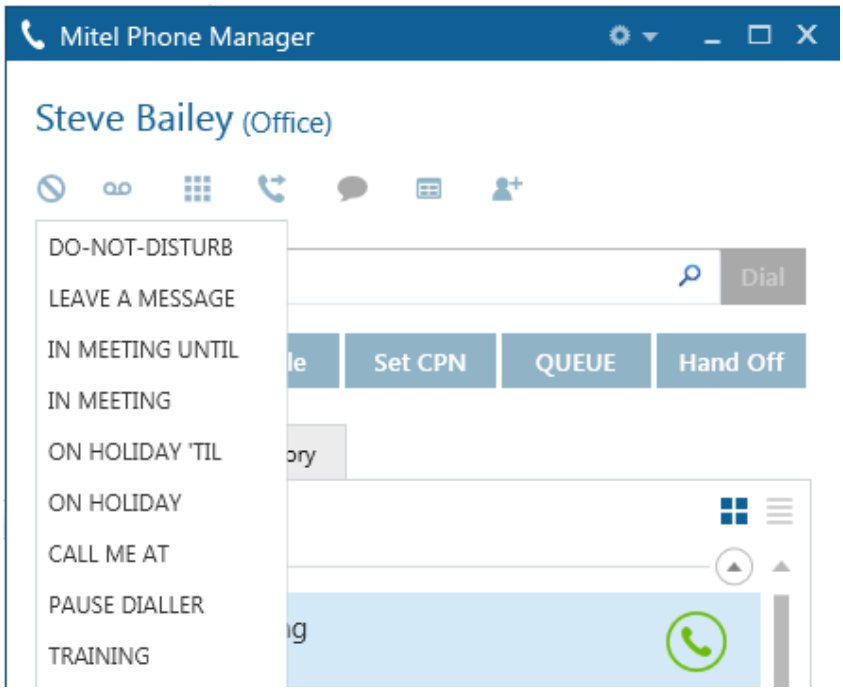
Phone Manager provides complete control over the status of your endpoint. This is all done through the main window using the various built in features.

Do Not Disturb	Single click access to any of the 20 do not disturb states programmed on the telephone system to ensure you are not interrupted when busy.
ACD Agent Control	Login to all or selected hunt groups your ACD agent ID belongs to.
Manual Forwarding	Control of the local forward state of your endpoint. For example, divert calls to voicemail or to your mobile when busy.
Voicemail Access	Visual indication of when you have voicemails and single access to dial into the voicemail system to retrieve them.
Volume Control	Increase or decrease the volume when ringing or during a call or mute the audio all together.

Do Not Disturb

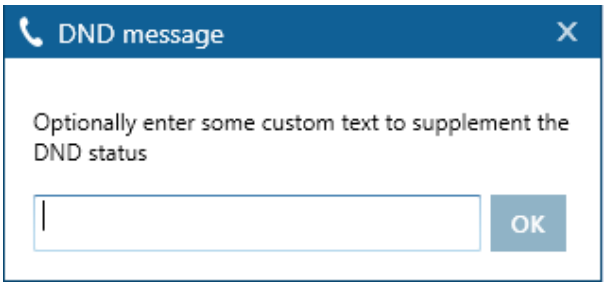
When away from your desk or busy in a meeting you can set the Do Not Disturb (DND) message on your phone so other users on the MiVoice Office 250 system know your status.

The phone system provides 20 predefined DND messages for you to choose from (These messages can be re-programmed on the MiVoice Office 250 system). Simply press the DND button and select 1 of the 20 messages.



Once you have selected a message you will then be presented with a text box asking you to enter the "DND Text". You can optionally enter up to 16 characters of text here to supplement the DND message selected.

For example: IN MEETING UNTIL – 12.30 PM



Any MiVoice Office 250 user now calling your phone or viewing your status in Phone Manager will see your DND message.

If you are in the DND state, the Phone Manager DND control button will turn blue , click on the icon to switch off DND. When switched off the DND icon will turn green .

ACD Agent Control

ACD Agent IDs can be used on the MiVoice Office 250 system to log in and out of whichever ACD hunt groups you Agent ID belongs to. Each hunt group would generally indicate a different type of call to be answered or indicate a specific skill set to use for that call.

If you have an Agent ID and have been given the permission to do so, you can log in and out of hunt groups using the agent icon on the main window.

If you are logged out and press the agent icon you will be presented with a list of hunt groups that you have been assigned to. To log into all groups select the 'Login Agent (xxxx)' option from the top of the menu. Alternatively select the specific hunt group you wish to log in to by simply clicking on the group.

While logged in, a green tick will show against all hunt groups that you are logged into. The menu can then be used to login or out of any of the other groups at any time.

Manual Forwarding

Your extension can have a manual forward set to divert calls to another destination under different circumstances. The various forward states available to choose from are:

No Answer	Forward calls when you don't answer them. The default no answer time on the PBX is 15 seconds (Th system wide timer can be changed)
Busy	Forward calls only when your extension is busy.
No Answer & Busy	This option is a combination of the first two options.
All Calls	Forward all calls that alert you extension immediately.

To change the forward state on your extension, click the forward state icon on the main window and select 1 of the 4 options available.

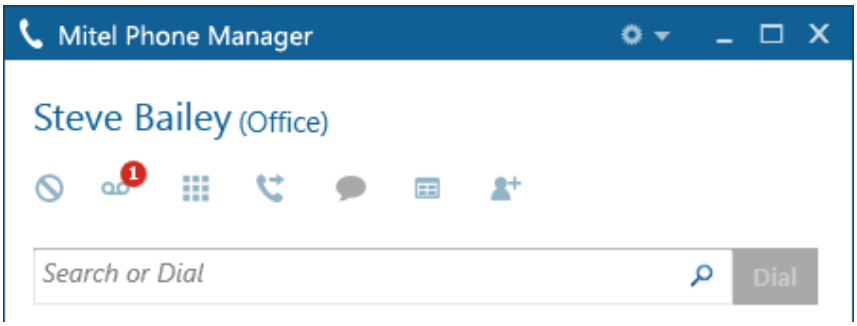
A text input box will then appear to prompt for a forward destination. In this box you can enter an internal number or external number such as a mobile phone number (If external remember to include the number to access an outside line).

If the forward state is already enabled, the forward icon will show in blue , click on the icon to remove the forward setting from your extension.

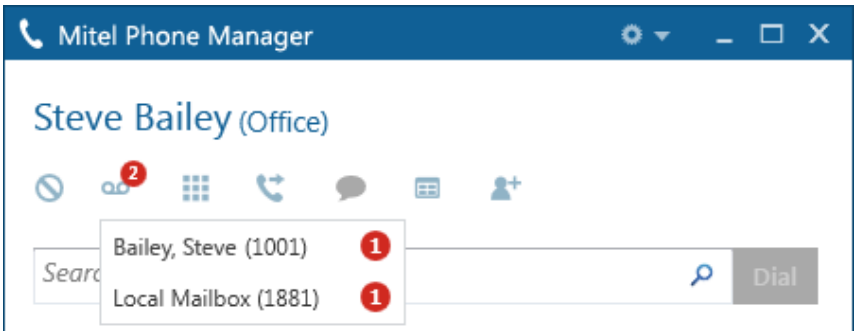
Note - The MiVoice Office 250 system also supports pre-programmed forward rules called "System Forwarding". Manual Forwarding will override any System Forwarding rules you may have set.

Voicemail Access

Voicemail notifications are displayed on the main window with the icon. When any new messages are left then the notification icon will show the number of messages in the red circle.



If you have outstanding voice messages from more than one source, clicking on the icon will display a list of all the voice mailboxes and the number of messages in each. Clicking on the relevant entry will dial straight into the associated message retrieval for that mailbox (remember that each source mailbox is likely to require a different password).



When there are no outstanding messages the red circle will no longer be visible and the icon will look like this :

Volume Control

The volume functions behave differently depending on whether Phone Manager is associated with your endpoint phone (Desk Phone) or in SIP softphone mode.

Endpoint Volume control

The volume of your endpoint phone can be controlled using the mute , volume increase and volume decrease icons at the bottom right of the main window.

When controlling a Mitel endpoint desk phone these icons are grouped together in the bottom right corner like this

Depending on the state of your endpoint the icons will do different things:

Idle or Ringing State	Mute will be disabled.
	Volume decrease will decrease the **ringing** volume and save it.
	Volume increase will increase the **ringing** volume and save it.
Call in progress on the handset	Mute will be enabled.
	Volume decrease will decrease the **handset** volume and save it.
	Volume increase will increase the **handset** volume and save it.

Additional types of call in progress include Hands Free and Headset and the volume control will apply independently to each type of audio call.

When the mute icon is pressed it will turn blue to indicate that audio is now muted on the call. To turn mute off simply click on the icon again.

Softphone Volume

The volume controls are enhanced to include a slide control when connected as a softphone. This offers a greater level of control than when Phone Manager is controlling an endpoint and look like this:

When using the volume control in softphone mode you will be setting the volume of whichever audio device is configured in Settings ---> Softphone ---> Audio within your Phone Manager software.

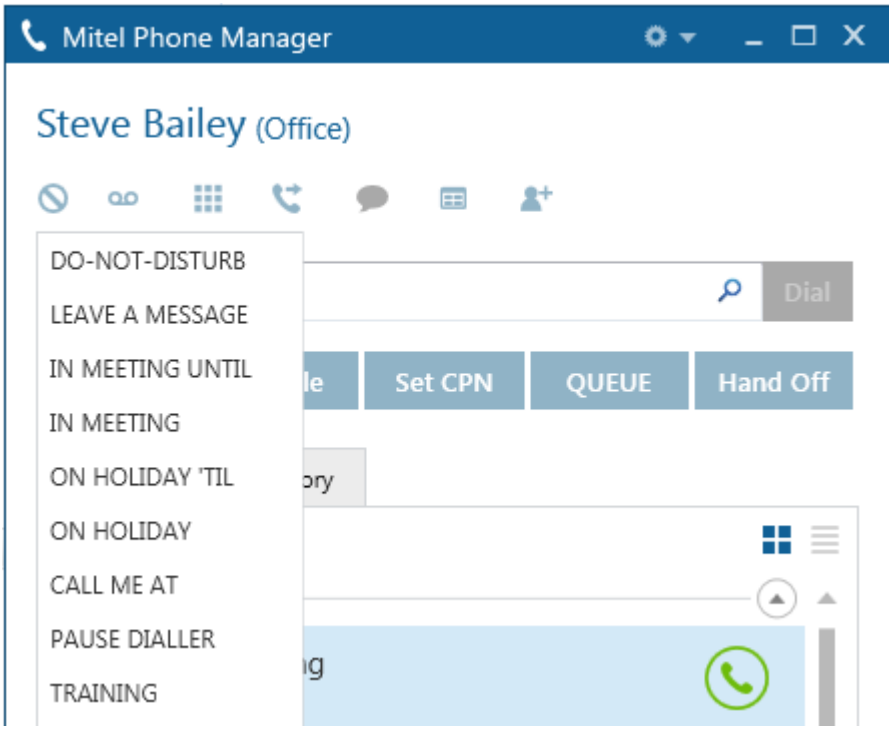
Volume control for a softphone is only available when using the built in softphone.

When muting a call on the softphone both parties audio are muted.

2.2.1 Do Not Disturb (DND)

When away from your desk or busy in a meeting you can set the Do Not Disturb (DND) message on your phone so other users on the MiVoice Office 250 system know your status.

The phone system provides 20 predefined DND messages for you to choose from (These messages can be re-programmed on the MiVoice Office 250 system). Simply press the DND button and select 1 of the 20 messages.



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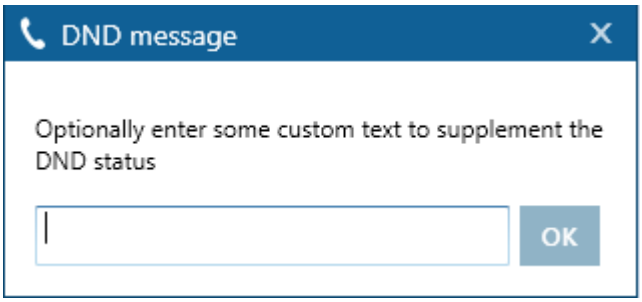

Any MiVoice Office 250 user now calling your phone or viewing your status in Phone Manager will see your DND message.

If you are in the DND state, the Phone Manager DND control button will turn blue , click on the icon to switch off DND. When switched off the DND icon will turn green .

2.2.2 ACD Agent Control

ACD Agent IDs can be used on the MiVoice Office 250 system to log in and out of whichever ACD hunt groups you Agent ID belongs to. Each hunt group would generally indicate a different type of call to be answered or indicate a specific skill set to use for that call.

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While logged in, a green tick will show against all hunt groups that you are logged into. The menu can then be used to login or out of any of the other groups at any time.

2.2.3 Manual Forward

Your extension can have a manual forward set to divert calls to another destination under different circumstances. The various forward states available to choose from are:

No Answer	Forward calls when you don't answer them. The default no answer time on the PBX is 15 seconds (This system wide timer can be changed)
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No Answer & Busy	This option is a combination of the first two options.
All Calls	Forward all calls that alert you extension immediately.

To change the forward state on your extension, click the forward state icon on the main window and select 1 of the 4 options available.

A text input box will then appear to prompt for a forward destination. In this box you can enter an internal number or external number such as a mobile phone number (If external remember to include the number to access an outside line).

If the forward state is already enabled, the forward icon will show in blue , click on the icon to remove the forward setting from your extension.

Note - The MiVoice Office 250 system also supports pre-programmed forward rules called "System Forwarding". Manual Forwarding will override any System Forwarding rules you may have set.

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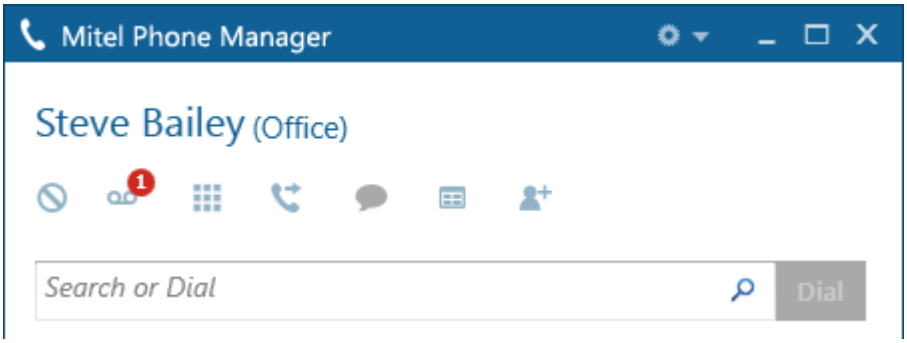
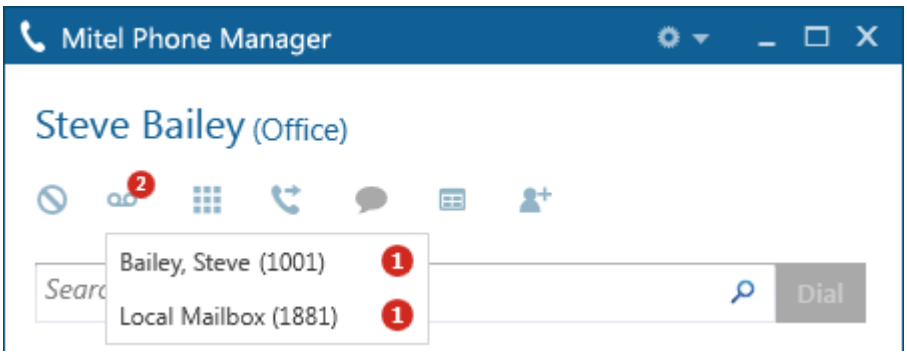
Voicemail notifications are displayed on the main window with the icon. When any new messages are left then the notification icon will show the number of messages in the red circle.



If you have outstanding voice messages from more than one source, clicking on the icon will display a list of all the voice mailboxes and the number of messages in each. Clicking on the relevant entry will dial straight into the associated message retrieval for that mailbox (remember that each source mailbox is likely to require a different password).



When there are no outstanding messages the red circle will no longer be visible and the icon will look like this :

2.2.5 Volume Control

The volume functions behave differently depending on whether Phone Manager is associated with your endpoint phone (Desk Phone) or in SIP softphone mode.

Endpoint Volume control

The volume of your endpoint phone can be controlled using the mute , volume increase and volume decrease icons at the bottom right of the main window.

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Depending on the state of your endpoint the icons will do different things:

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	Volume decrease will decrease the **ringing** volume and save it.
	Volume increase will increase the **ringing** volume and save it.
Call in progress on the handset	Mute will be enabled.
	Volume decrease will decrease the **handset** volume and save it.
	Volume increase will increase the **handset** volume and save it.

Additional types of call in progress include Hands Free and Headset and the volume control will apply independently to each type of audio call.

When the mute icon is pressed it will turn blue to indicate that audio is now muted on the call. To turn mute off simply click on the icon again.

Softphone Volume

The volume controls are enhanced to include a slide control when connected as a softphone. This offers a greater level of control than when Phone Manager is controlling an endpoint and look like this:

When using the volume control in softphone mode you will be setting the volume of whichever audio device is configured in Settings ---> Softphone ---> Audio within your Phone Manager software.

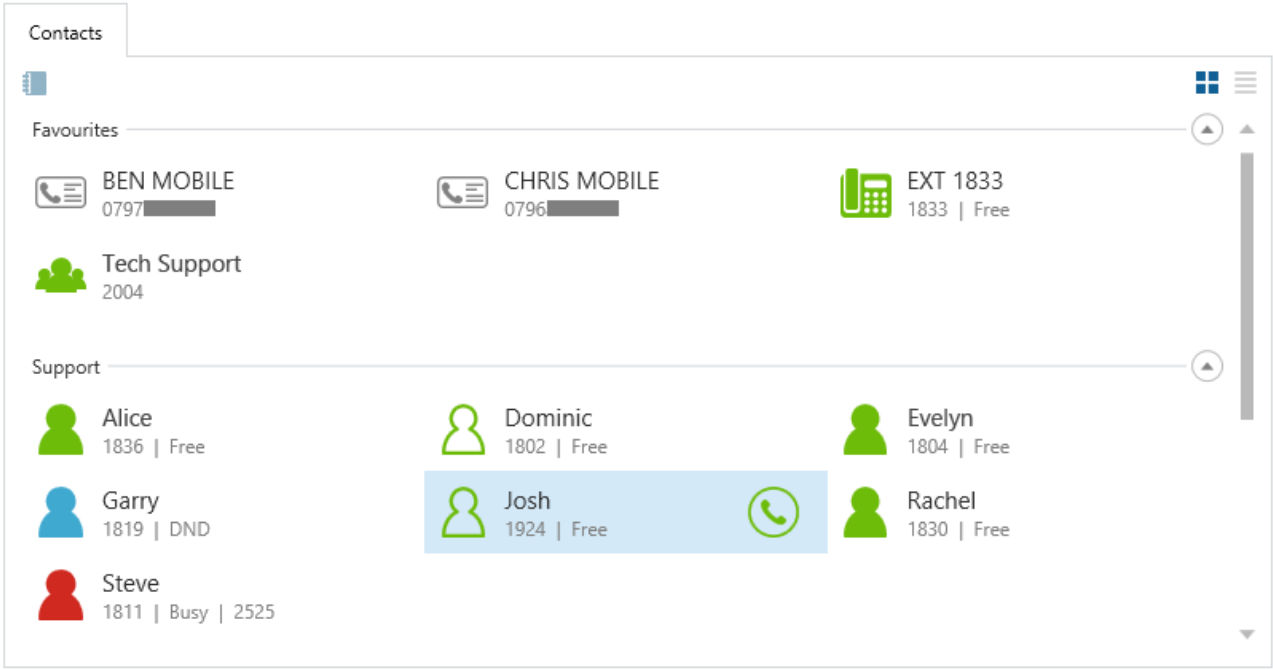
> Volume control for a softphone is only available when using the built in softphone.

> When muting a call on the softphone both parties audio are muted.

2.3 Contacts

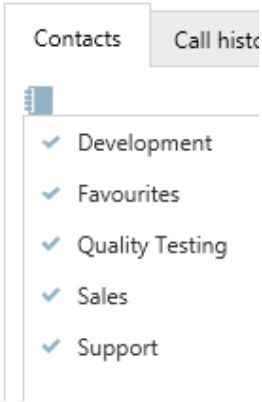
Overview

The contacts tab within Phone Manager provides a view to provide real-time information about other devices including Users, endpoints, agents, speed dials and hunt groups. This gives a single quick view of the status of these devices and call control features such as single click to dial.



Groups

Each device that is shown is part of a group. Clicking the directory button on the top left hand corner displays the available directories and gives the User the ability to be able show or hide each group.



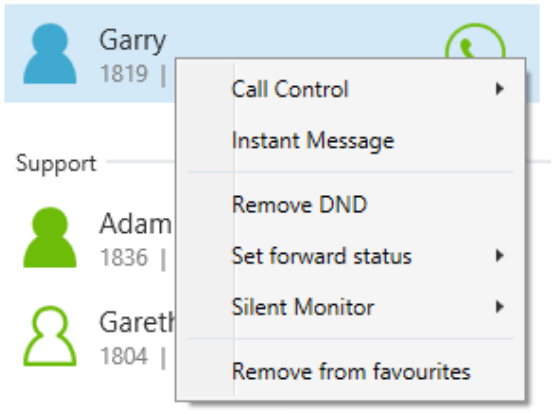
If there is a green tick next to the entry then this will be shown. Un checking this will cause the directory to be hidden.

Each Phone Manager User has their own Favourites group which they can add and remove devices to and from and is personal to each User. They can also add items from the Directories to this, for example Speed Dials, Personal Contacts, Central Contacts or Microsoft Outlook Contacts.

The other groups are created automatically from the Business Unit structure configured on the server.

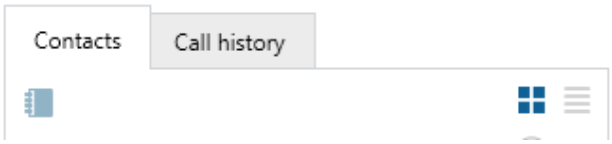
Device Control

For each device there are actions that can be performed. Right clicking on a device will display a menu of the available actions and the options available are dependent on the type of device, the state of the device and the license level of the client.



Device View

The contacts tab supports displaying the device information in either a large icon or a details view. The current view can be changed using the view selection buttons in the top right corner.



The current view is highlighted in blue, with the large icon view using the left button and the details view on the right.

Device Icons

Each type of device has a different icon and changes color depending on the status of the device.

	Central server or personal contact, i.e. Global Directory.
	Microsoft Outlook contact.
	User who is not connected with Phone Manager and has no endpoint/agent assigned to their User account.
	User in the free state without Phone Manager connected (this shows the status of the endpoint/agent assignec their User account).
	User in the busy state without Phone Manager connected (this shows the status of the endpoint/agent assigne their User account).
	User in the DND state without Phone Manager connected (this shows the status of the endpoint/agent assigne their User account).
	User in the free state who has Phone Manager connected.
	User in the busy state who has Phone Manager connected.
	User in the DND state who has Phone Manager connected.
	Endpoint in the free state.
	Endpoint in the busy state.
	Endpoint in the DND state.

	Agent is logged out.
	Agent in the free state.
	Agent in the busy state.
	Agent in the DND state.
	Agent in the wrap-up state.
	Hunt group.

2.3.1 Directories

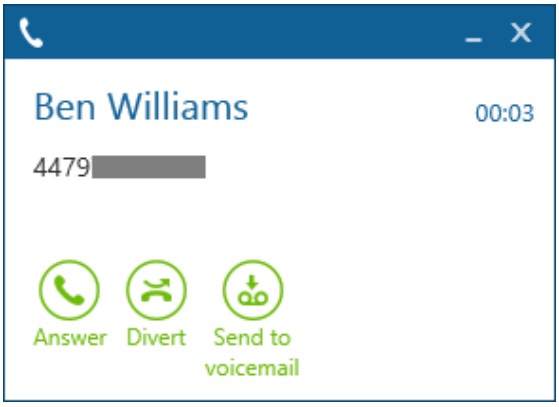
Overview

Contact directory information can be imported into Phone Manager's server to give more information about the contacts who are calling in and to provide directory search features to help find people to call.

There are several different sources that can be used to import contact records. They include:

- Central contact databases, for example Microsoft Dynamics CRM, Salesforce.com etc.
- The Personal contact Directory for your Phone Manager user account.
- Your own Microsoft Outlook personal contacts.
- The MiVoice Office 250 PBX System Speed Dial list (Maximum 1000).

Using the contact directories, Phone Manager can search to find any matching contacts to dial. When an inbound call is received or an outbound call made, the relevant directories are searched automatically and the matching contact information is made available and displayed on the Phone Manager toaster.



Central contact databases

For central based contacts the information is stored and accessed from a single location. This can include a text file in CSV format or a direct database connection using ODBC or OLE DB. The contacts from these locations can be imported into the system manually or on a pre configured schedule so that the directories are always up to date.

> For more information see the Contact Directories section in the server help.

Microsoft Outlook personal contacts

If a User has the *Download Outlook contacts* option enabled in their *Client Profile* on the server, then personal contacts from within Microsoft Outlook can be searched directly from Phone Manager.

> The User needs to be connected with a Microsoft Outlook license to enable this feature.

> This requires Microsoft Outlook to be running within the same session as the Phone Manager client and only loca contact folders are supported.

The contacts can be searched using the Home, Telephone or Mobile/Cell number fields as well as the first, middle, last and company name fields associated with the Outlook contact. The only user that can search and access these contacts is the local User. Other Users cannot access these contacts.

MiVoice Office 250 PBX System Speed Dial List

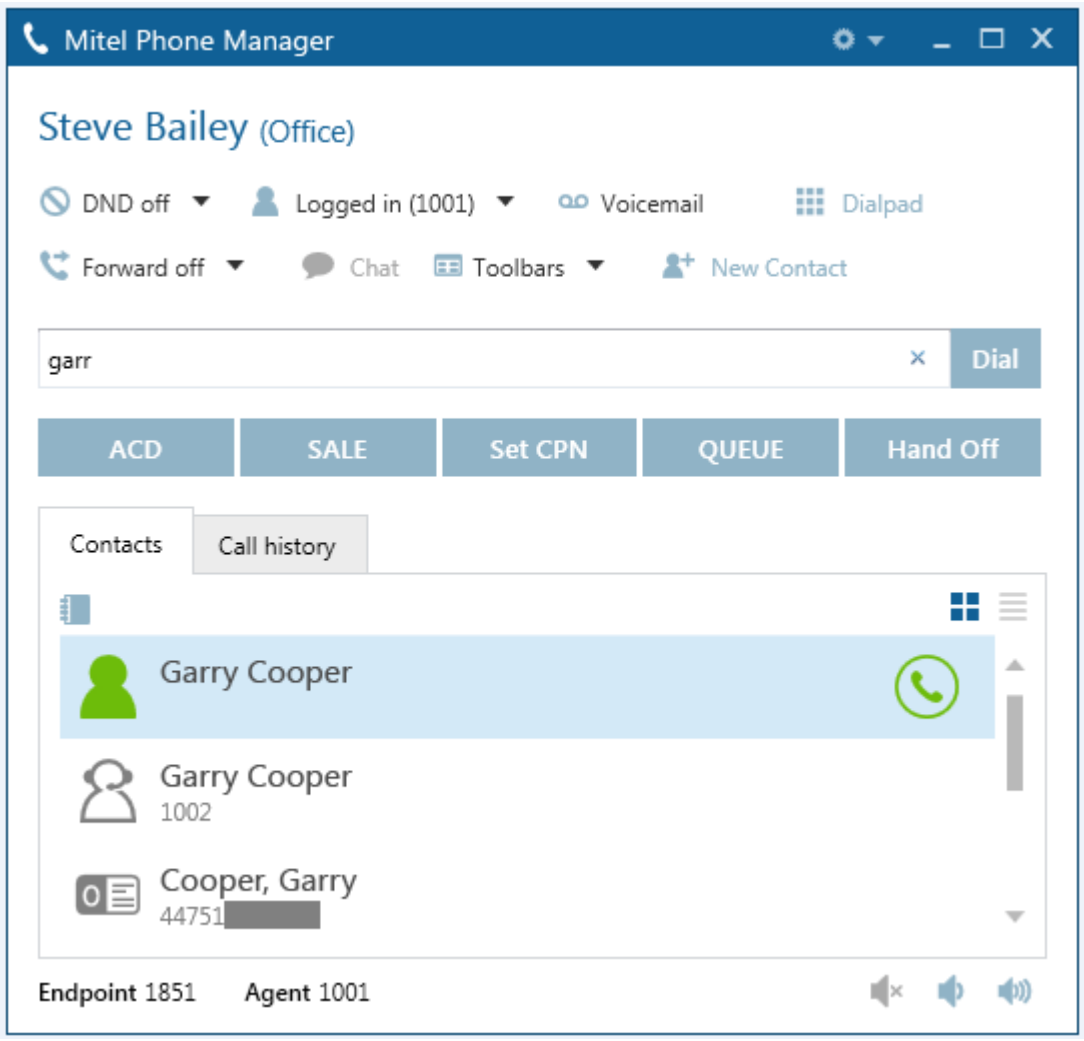
The PBX contains its own directory in the form of system speed dials. These entries are configured from within Database Programming on the MiVoice Office 250 system and the Phone Manager server will download them directly from the PBX when connected. Each entry only has a name and number associated with it and each of these fields can be used to search. Any changes to this list made on the MiVoice Office 250 system will automatically update the Phone Manager directory.

All Phone Manager users have access to search and dial the MiVoice Office 250 system speed dials.

2.3.2 Searching

Overview

Searching for contacts is done from the main window in the *Search or Dial* section. Typing in a relevant search term, i.e. telephone number or name, will shortcut to any matching entries in the contacts tab.



The search will try and find a match in any of the devices on the PBX or within any of the directories that have been assigned to your Phone Manager user account on the server.

To cancel a search click onto the X next to the *Dial* button and this will restore the contacts tab back to the default view.

Remember to cancel a search so that your entire contacts are visible on the contacts tab.

2.4 Call History

Overview

The call history provides a list of all of your recent call activity. This includes internal calls, external inbound and outbound calls and missed calls that were not answered. If the User has multiple devices (endpoints/agents) associated with their profile then the history will show calls for all these whilst the User was linked with them (In other words the call history represents the Phone Manager user rather than the device on which the call took place).

The history is refreshed after a call is cleared from the current endpoint phone.

> The call history does not require Phone Manager to be running to save the call information - the server logs the call history centrally.

For each call the history tab shows the following information:

- **Name** : This is either the name of the contact that has been matched to the call or if none is available then the outside number.
- **Time**: The time of day that the call was made or received.
- **Talk Time**: The length of time that the call was connected.
- **Ring Time**: The length of time that the call was ringing.
- **CLI**: The caller id (Calling Party Number) or outside number. This is only populated for external calls.
- **DID**: The direct number dialled by the inbound caller. This is only populated for inbound external calls.
- **Hunt Group**: The hunt group that the call came in on. This is only populated for inbound external calls.
- **Account Code**: This shows any account codes that were set against the call whilst in progress.

> As the main window is resized the number of columns shown will change as there is more space to display these.

To the left hand side of each entry the icon shows what type of call this is.

	Outbound call
	Inbound call
	Inbound missed call

Next to each entry, on the right hand side, there are icons to dial the contact back and if the system has call recording integration enabled and the User has playback rights, then they can listen to the associated call recording for the call.

> The call history will show a maximum of 50 calls for each User.

2.4.1 Call Recording

Overview

Phone Manager can integrate into a Call Recorder to provide direct access to playback the recordings for the User. Call recording can also be paused/resumed to enable specific parts of a call to not be recorded, for example when credit card details are being provided.

Additional 3rd party licensing may be required to pause/resume call recordings.

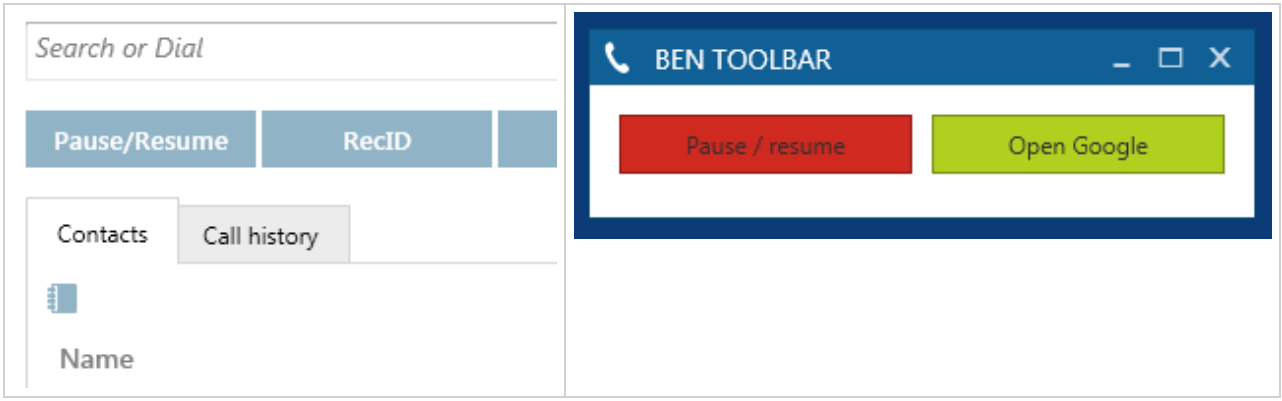
Playback

Call recordings can be played back from the Call History tab within Phone Manager by clicking onto the icon next to the specific call.

This provides a direct link to the playback page for this call. To access the recording the User must have a valid account on the call recorder that grants them access to the call they are trying to listen to.

Pause / Resume

Call recordings can be manually paused and resumed by configuring a Toolbar button. This can be on the main window integrated toolbar or on an external toolbar.



2.5 Chat

Overview

Chat is an instant messaging style feature that allows Phone Manager Users to exchange short messages with each other. When a chat session is started a new conversation is created that groups the messages sent together. If a User is offline when a chat message is sent they will be notified of new messages when they next come online.

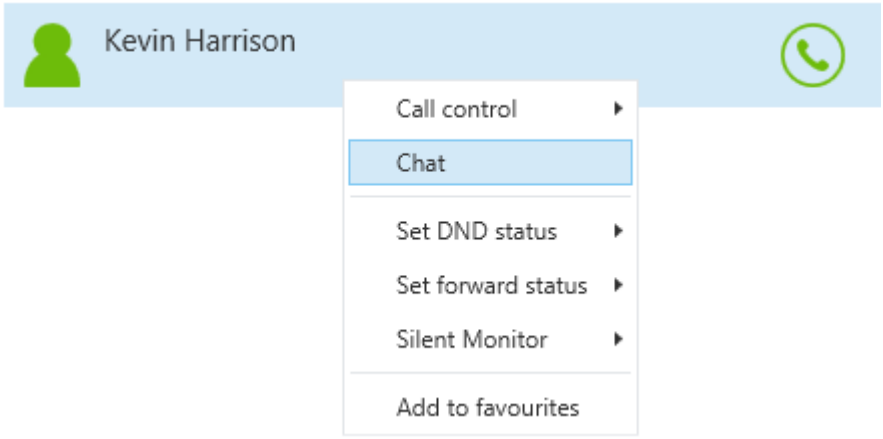
Pay attention to the icon for a user you wish to commence a chat session with. The colours give you a hint as to the status of their phone and the type of icon indicates whether the user is likely to see your chat message straight away or later on.

This hollow Green icon means the endpoint for this user is free but their Phone Manager software is not running so they won't see your message until the next time they run Phone Manager.

This solid Green icon means the endpoint for this user is free **and** their Phone Manager is running so they should see your chat message straight away.

This solid Red icon means this user is busy on a call but they should see your chat message straight away.

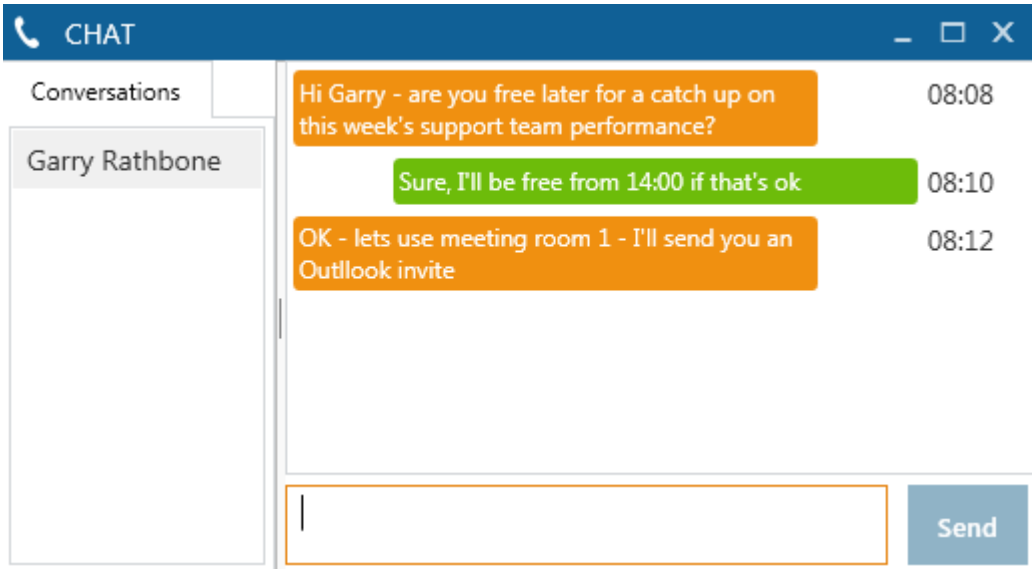
To initiate a chat session right click on the user's icon and select chat from the menu. (This menu shows the options available with the Phone Manager Team Leader license for a contact centre manager)



Phone Manager will only show the messages received since it was last started. Closing the client and reopening will clear the chat history. Chat history is logged on the server to provide access to past chat sessions and for reporting.

The maximum length per chat message is 2500 characters.

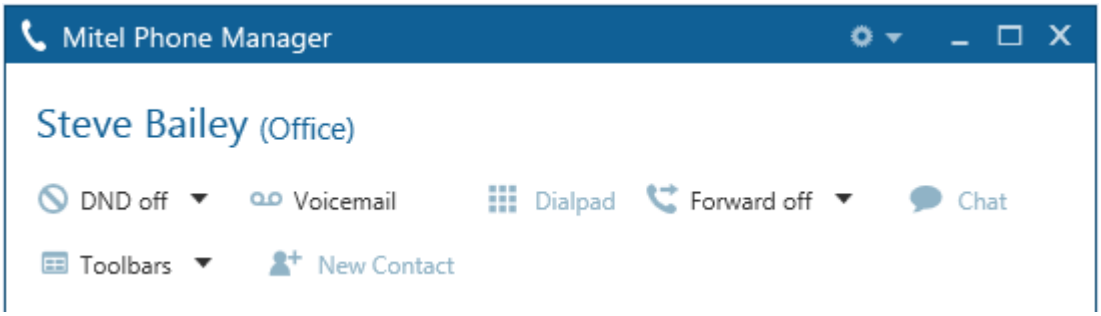
This is what your chat session would look like.


CHAT
Conversations
Garry Rathbone
Hi Garry - are you free later for a catch up on this week's support team performance?
08:08
Sure, I'll be free from 14:00 if that's ok
08:10
OK - lets use meeting room 1 - I'll send you an Outllook invite
08:12
Send

Message Notifications

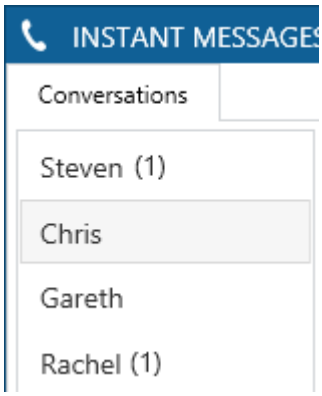
When a new message is received then the icon on the start menu will turn orange.

The Chat icon on the main windows will also display a red circle with the number of new messages.



Clicking on the icon will display the new message. Messages you send are shown in orange and messages received are shown in green. The time of the message is tagged to the right of the message.

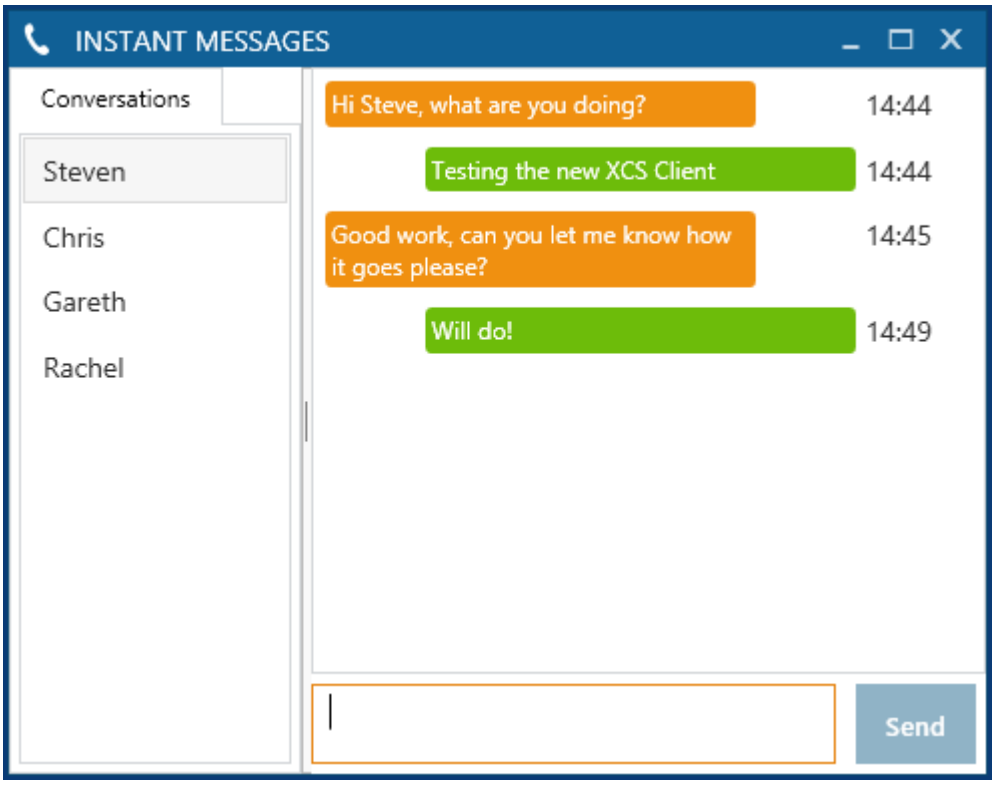
Next to each conversation if there are new unread messages then the number of them will be shown against Users conversation.



Multiple Chat Sessions

Multiple chat sessions are grouped by the User who the message is sent to or received from. Each User has the list of

conversations shown on the left hand side and clicking on the name will change the right hand window to show the history.



2.6 Hot Keys

Overview

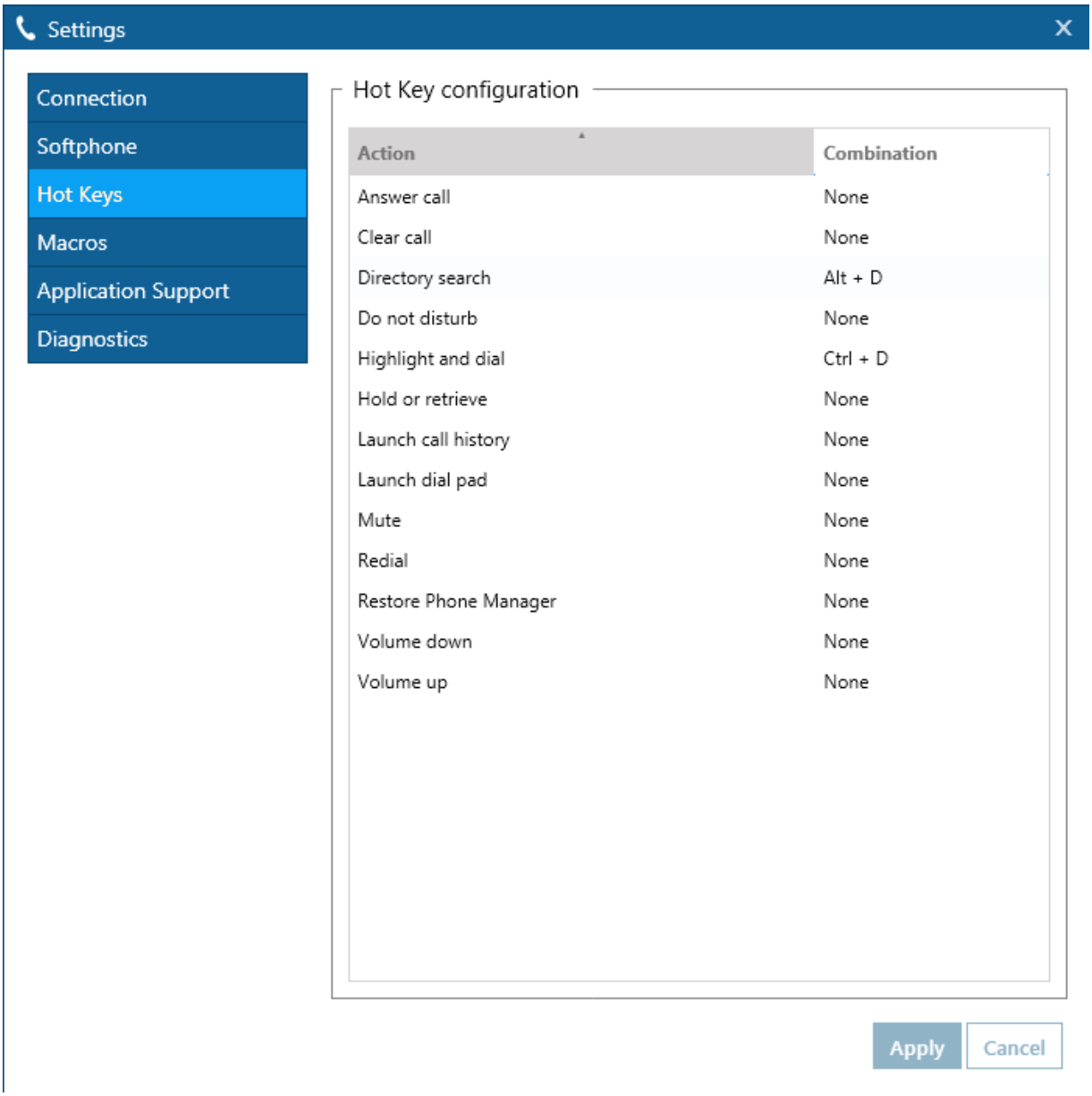
Hot Keys enable Users to set a combination of keystrokes to access commonly used features within Phone Manager. The configuration of the hot keys is specific to each User. The following list of hot key actions are supported:

Action	Description
Answer call	Answers the call currently ringing. If there are any calls in progress then this is ignored.
Clear call	Clears the call that is connected to the endpoint.
Directory search	Brings the main window to the front and sets the focus and cursor to the *Search or Dial* field.
Do not disturb	Toggles the DND state at the endpoint. If no message is pre configured then it will prompt for the message to use.
Highlight and dial	Dials the number that is currently highlighted in other applications.
Hold or retrieve	If a call is on hold then retrieves the call otherwise puts it on hold.
Launch call history	Brings the main window to the front and sets the call history tab in focus.
Launch dial pad	Shows the dial pad window.
Mute	Mutes the audio for the current call. If this is a softphone then both sides of the call are muted otherwise only the audio from the Users endpoint is muted. See Softphone Limitations.
Redial	Redials the last number using the Mitel feature (default code 380). Not supported on softphone (use call history instead), see Softphone Limitations.
Restore Phone Manager	Brings the main window to the front.
Volume up	Increases the volume level. See the Volume Control section for details.
Volume down	Decrease the volume level. See the Volume Controlsection for details.

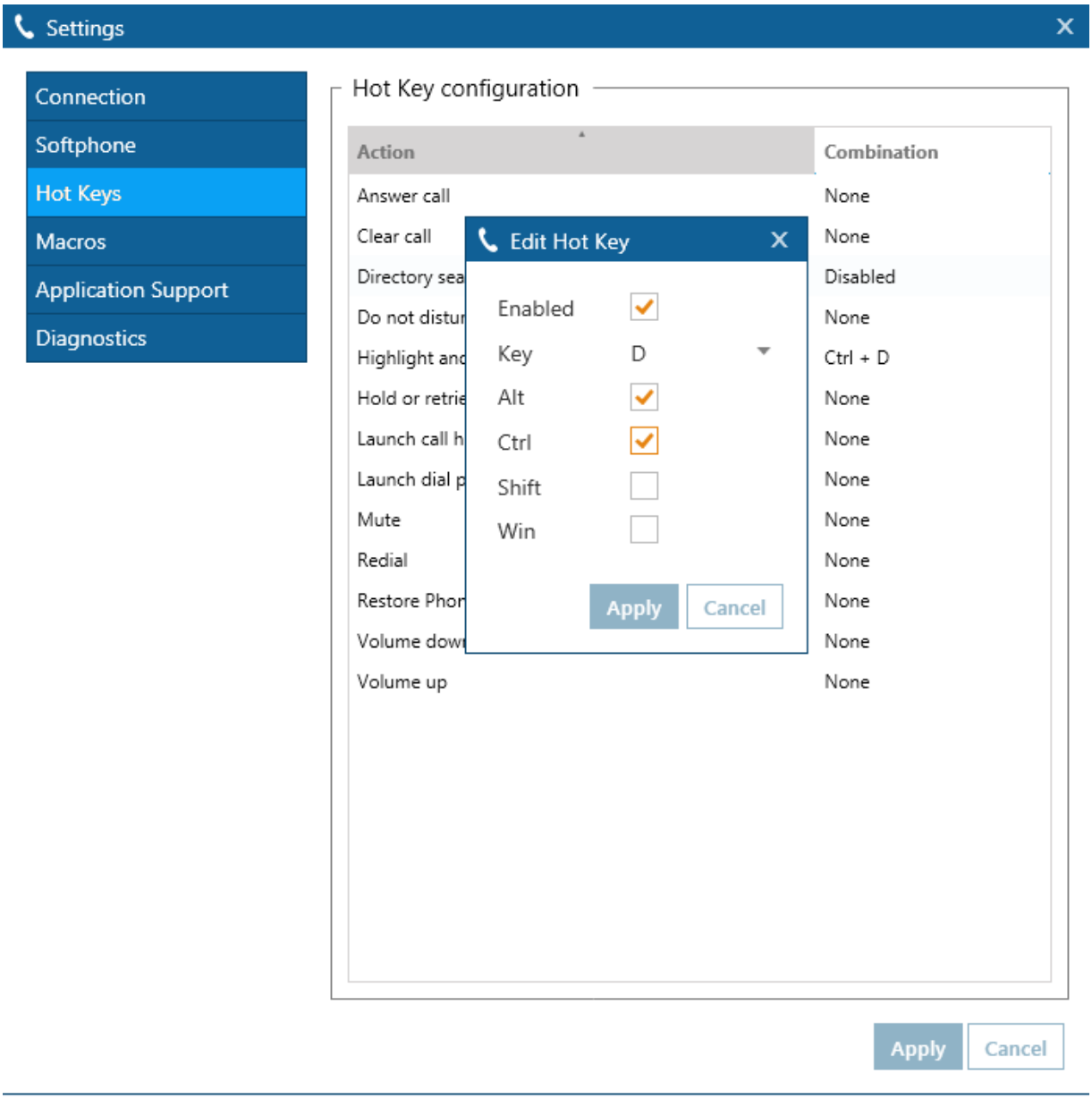
Configuration

To configure the hot keys:

1. Open the *Settings* window.
2. Select the *Hot Keys* tab.



3. Double click on the hot key entry to configure.



4. Each hot key needs to be enabled, check the **Enabled** option to do this.
5. Select the **Key** to use for the hot key.
6. Check the **Alt**, **Ctrl**, **Shift** and/or **Win** checkbox's that will be used in combination to the **Key** selected.
7. Click on **Apply** to save the changes/

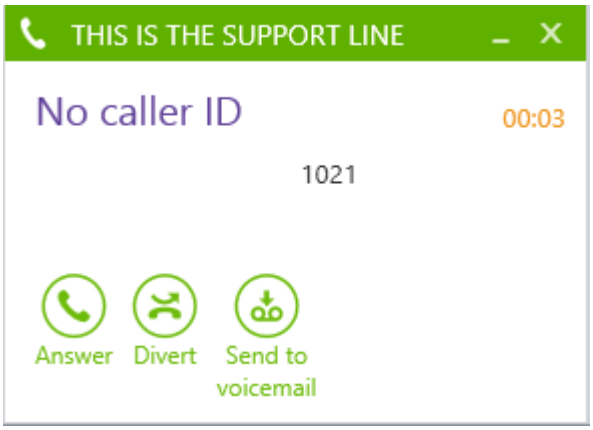
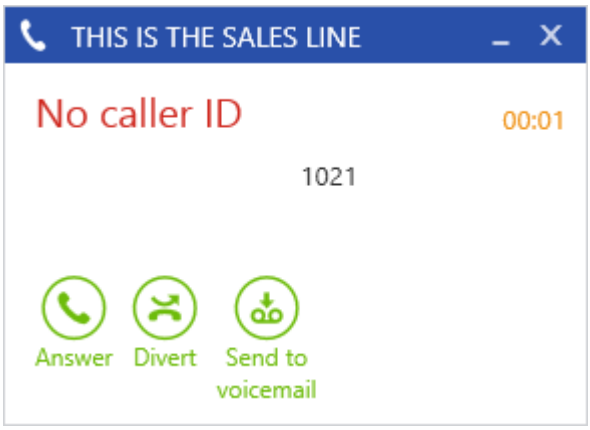
⚠ Always configure the hotkeys to use at least 3 combinations, for example Alt + Ctrl + D. Using simpler combinations may result in conflicts with other application that are running at the same time.

2.7 Call Banner Profiles

Overview

Banner profiles control how the Phone Manager toaster popup is displayed when calls are received at the client. The information that is displayed, the color and text of the title bar can be changed depending on a specific set of conditions being met for the call.

For example, using a condition on the DID number, support line calls could be shown with a green banner whilst sales calls with a blue banner.

Support line calls shown with a green banner.	Sales line calls could be shown with a blue banner.
	

Several different profiles can be created and they can be given a priority so that if two banners have a similar condition then the one with the highest priority will be used.

This feature can be used to identify VIP callers in order to improve customer service.

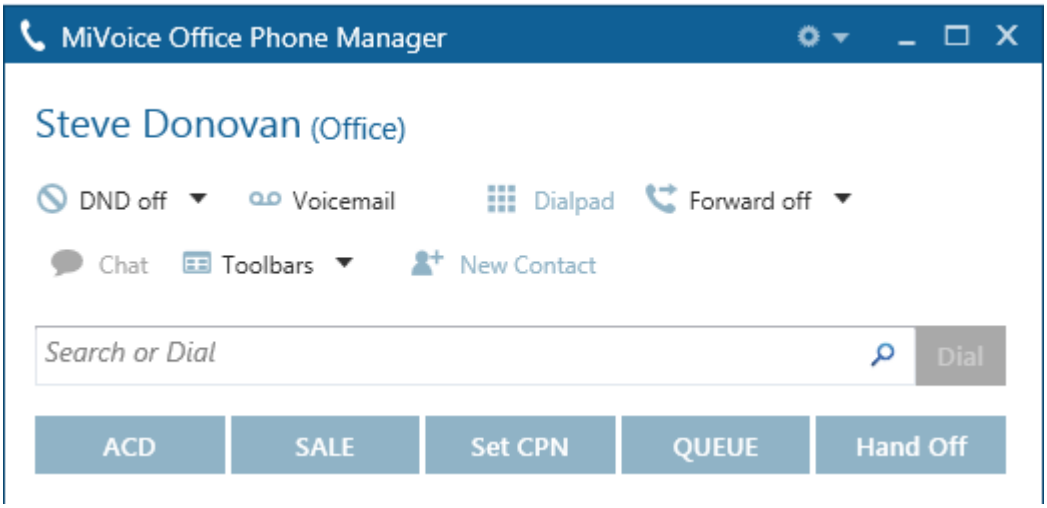
See the Call Banner Profile section on the Communication Service server for details on how to configure these.

2.8 Integrated Toolbar

Overview

The integrated toolbar provides five buttons on the main window shown underneath the *Search or Dial* field. Each button can be customized by the User to set the label shown and what action is performed when the button is clicked.

This is only available when running with a Professional or higher license or when using the built in softphone.



Customizing Buttons

To edit the button:

1. Right click the button and select *Edit.*
2. Select the *Action* to perform from the Action drop down list. See the Button Actions section for details.
3. Enter the name that will be shown on the button in the *Name* field.
4. Configure any *Parameters* if required by the *Action* selected.

3 Professional Features

The following section covers the features that are available in the Professional licensed version of Phone Manager.

ACD Agent Control	Ability for the User to control their ACD status.
Integrated Toolbar	This provides 5 buttons that can be customised on the main window.
Toolbars	This give access to the full toolbars.
Application Support	Integration into 3rd party application using API Access, Macros, TAPI, Command Line or Application Support Plugins.

3.1 Application Support

Phone Manager can integrate into 3rd party applications in several ways depending on the requirements and features that are supported by the application. This can be as simple as Highlight & Dial or more complex full call control and events using API Access or Macro design.

The following is the list of integration options available.

Method	Description
Directories	Contact directory imports, to display information about the caller on the toaster.
Highlight & Dial	Dialling from other applications by selecting the number and then activating the dial by using Hot Keys or double clicking on the highlight and dial icon.
Command Line	Command line arguments can be passed to the client executable to perform actions.
Macros	VBScript macros that can be activated on call events or manually by the User.
TAPI	1st Party TAPI driver for integration into 3rd party applications.
Application Support Plugins	Plugins provide specific integration to a range of well known CRM style applications.

If the application or version is not currently supported then complete the integration request process and we can investigate the possibility of supporting this application.

3.1.1 API Access

Overview

The client provides API components that can be used to embed some of the functionality of the Phone Manager client into a 3rd party application. Unlike the other Application Support options the client does not have to be running to do this.

All of the call controls events and methods are available, so applications can react to call ringing events and receive the call details and then perform their own handling of what to do next, i.e. screen popping, dialing out etc.

This does require development work to be performed by the application vendor or administrator.

When using the API the Phone Manager client can be running at the same time and this will only consume a single license as long as the Phone Manager client and the application are running in the same user session.

See the Phone Manager API reference for more information.

3.1.2 Macros

Overview

Phone Manager Professional license supports a scripting interface to allow VBScript macros to be developed. They can then be configured to trigger on a manual User action, i.e. a toolbar button action, or automatically on pre-defined call events. The scripting interface provides access to the call information that can be used within the script and extra methods to control the endpoint and other features, i.e. call recording.

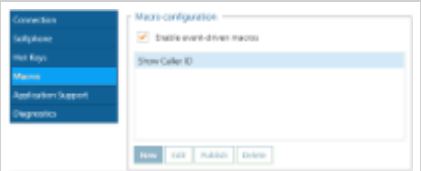
For example this VBScript example will display a message box when an incoming call is received and display the caller id:

```
MsgBox "Call from " & PhoneControl.CLI
```

See the Phone Manager Macro API reference for more information.

Configuration

The macro design and configuration is available for Users who have the *Allow macro editing* option enabled on their *Client Profile* on the server. WIthout this option Users can only change the **Enable event-driven macros** option. This controls if the macros that have been assigned to the User will be triggered on the associated call events.



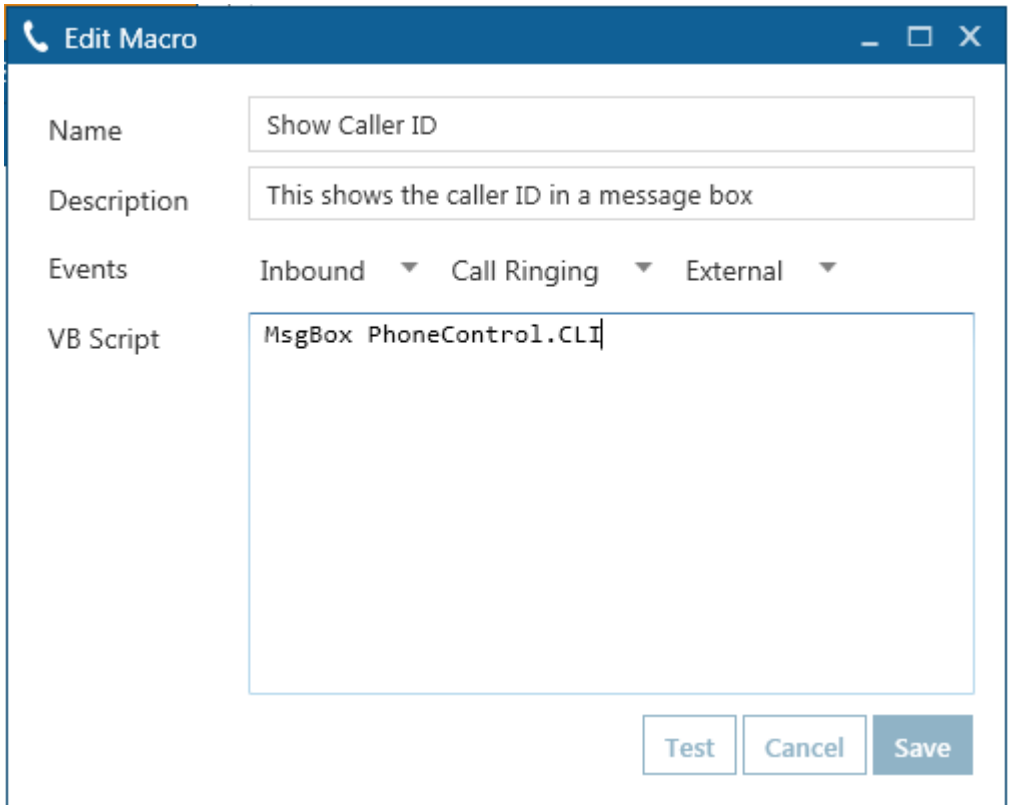
Macros

When creating new macros they are first designed and tested from within this section. When this is complete they can be published and this makes them available on the server. Once published they can then be assigned to the relevant Users. A copy is made of the local version of the macro and this can then not be edited. Any updates would need to be made on the original local version and then re published. Users would then need to be reassigned to this new published version. This provides a level of security to prevent macros being deployed without permission.

The list of macros shown in the *Macro Configuration* section only shows the local macros not published to the server for this User. To see the list of published macros see the *Macros* section on the server user interface.

To create or edit a new macro:

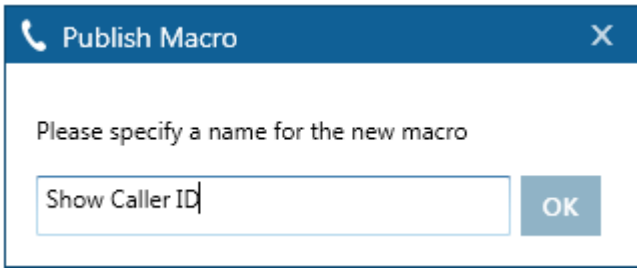
1. Click on the *New* or *Edit* button.



2. Enter a **Name** that will be used on the server to identify this macro.
3. Enter a **Description** that can be used to detail what this macro is for.
4. Select the call event to automatically trigger the macro.
    - Direction: inbound, outbound or both.
    - State: call ringing, call answered, call cleared, call cleared only when answered or user controlled (i.e. via a toolbar button).
    - Type: external, internal or both.
5. Enter the macro text in the **VB Script** section.
6. Use the **Test** button to validate the syntax. If there are any errors then a message box will be displayed indicating the error.
7. Click on **Save** to save this macro.

To publish a macro:

1. Select the macro from the list of macros available.
2. Click on **Publish**.



3. Enter a new name for the macro, it is recommend to include a version or revision number.
4. Click **Ok**
5. From the server user interface, assign this to the relevant Users.

To delete a published macro:

1. From the server open the Site -> Features -> Phone Manager -> Macros section

2. Select the macro and click on **Delete**.

3.1.3 Application Support Plugins

Overview

Phone Manager Professional License contains plugins available that are able to directly integrate with a range of well known CRM and PIM applications. The plugins generally provide deeper, more seamless integration than other methods as they leverage the APIs of the specific application.

Features

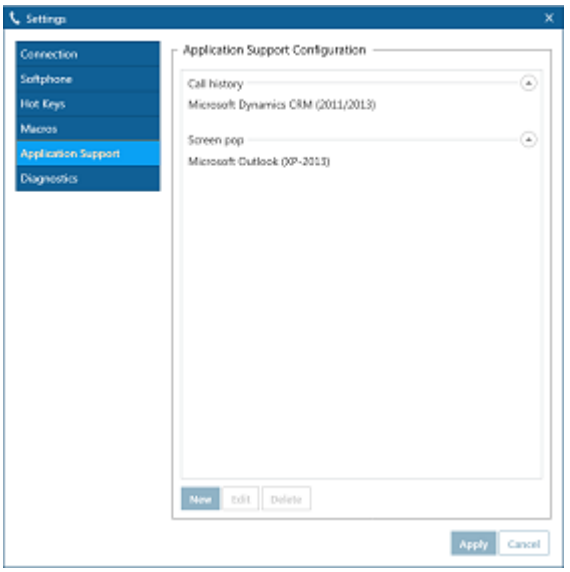
There are 4 features that the plugins can provide. Depending on the application that is being integrated with, only some features may be available with varying levels of support and there may need to be integration work performed by the application vendor or administrator of the system. See the application integration document for the specific plugin for details.

- **Dial out directly from the application**: For example having a dial button next to a telephone number field.
- **Screen popping**: Searching the application for contacts that have matching caller ids and displaying the record.
- **Call history**: Creating a call history phone call activity in the application with the call details.
- **Calendar and DND synchronisation**: Controlling the DND state of the endpoint based upon calendar entries in the application.

Configuration

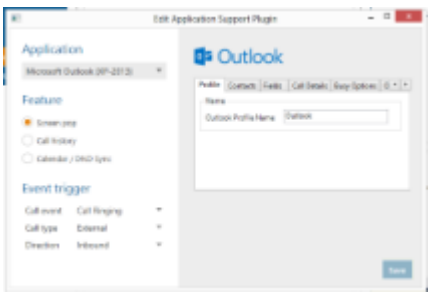
To configure a plugin for one of the application support features:

1. From the Application Support Configuration section.



Plugins

2. Click on the **New** button.



Plugin configuration

3. From the list of **Application**s select the application to integrate with.
4. This will then change configuration on the right hand side to show the specific configuration required for this plugin. See the relevant integration document for details.
5. Select the **Feature** to enable either:
    - Screen pop
    - Call history
    - Calendar / DND sync
6. Multiple features can be enabled for each plugin by repeating the process from step 1.
7. Select the event trigger that will cause the feature to be acted on (this is not applicable to Calendar / DND sync).
    - Direction: inbound, outbound or both.
    - State: call ringing, call answered, call cleared, call cleared only when answered or user controlled (i.e. via a toolbar button).
    - Type: external, internal or both.
8. Click on **Save**.

3.1.4 TAPI

Overview

The TAPI Service Provider (TSP) provides a 1st Party TAPI support for client applications, 3rd Party TAPI is not supported. Multi user environments such as Terminal Service, Remote Desktop or Citrix configurations are not supported in this release.

The TSP service supports the TAPI v2 and TAPI v3 standards.

The TSP only supports call control over the first call at a single device and limited events (new & end) for additional calls will be provided to the client application.

The TSP cannot be tested against every application that “supports” TAPI due to the different ways that it can be implemented. Additionally the features available within the client application are dependent on what the 3rd party application has implemented. The TSP will not necessarily work with every application that has implemented TAPI and would need to be verified to ensure proper integration.

The TSP supports the following basic telephony functions as defined by Microsoft.

http://msdn.microsoft.com/en-us/library/windows/desktop/ms725522%28v=vs.85%29.aspx#tspi.call_states_and_events_qref

3.1.5 Command Line

Overview

The client can be run via the command line to override the local configuration options on startup and to perform basic call control actions while the client is running.

For example *PhoneManager.Client.exe MC: 8889274671*, will cause the number 8889274671 to dialed.

Startup Options

If a client is not running then the following arguments can be used to override the local configuration of the client when it starts up. For example to use a different endpoint number or a different user account.

To override the location:	/Override:"true" /Location:"Office"
To override the endpoint:	/Override:"true" /Endpoint:"1001"
To override the server & user details:	/Override:"true" /Host:"appserver" /Username:"domain\user" /Password:"mypassword" /Override:"true" /Host:"appserver" /Username:"user1" /Password:"mypassword"

Running Options

If the client is running then the following arguments can be used to perform basic call control actions.

Call & Endpoint Control Arguments	
MC {number} {accountcode}	Makes a call to the given *number*, if an *account code* is provided then this used whe making the call.
ANS	Answers a ringing call at the endpoint.
CC	Clears the current active call at the endpoint.
HC	Hold the current active call at the endpoint.
RC	Retrieve the held call at the endpoint.
AC {accountcode}	Set the *accountcode* against the current active call at the endpoint.
MD {text}	Changes the top line display of the screen on the keyset to the *text* value, upto 16 characters. This requires an external trunk call to be in progress.
DND {messagetext}	Sets DND on the endpoint using the given *messagetext*, if no messagetext is specifi then the endpoint is removed from DND.
TOGGLEDND	Toggle DND at the endpoint, so if it is enabled then removes it and sets it if not enab
LN {agentId} {huntgroup}	Logs the ACD *agentid* into the given *huntgroup*. If no *huntgroup* is provided then all groups.
LF {agentId} {huntgroup}	Logs the ACD *agentid* out of the given *huntgroup*. If no *huntgroup* is provided then a hunt groups.
VD	Decreases the volume at the endpoint. See Volume Control section for details.
VI	Increase volume at the endpoint. See Volume Control section for details.
FI {destination}	Sets an immediate forward to the *destination*.
FB {destination}	Sets an forward on busy to the *destination*.
FN	Removes any forwarding.
FNA {destination}	Sets a forward no answer to the *destination*.

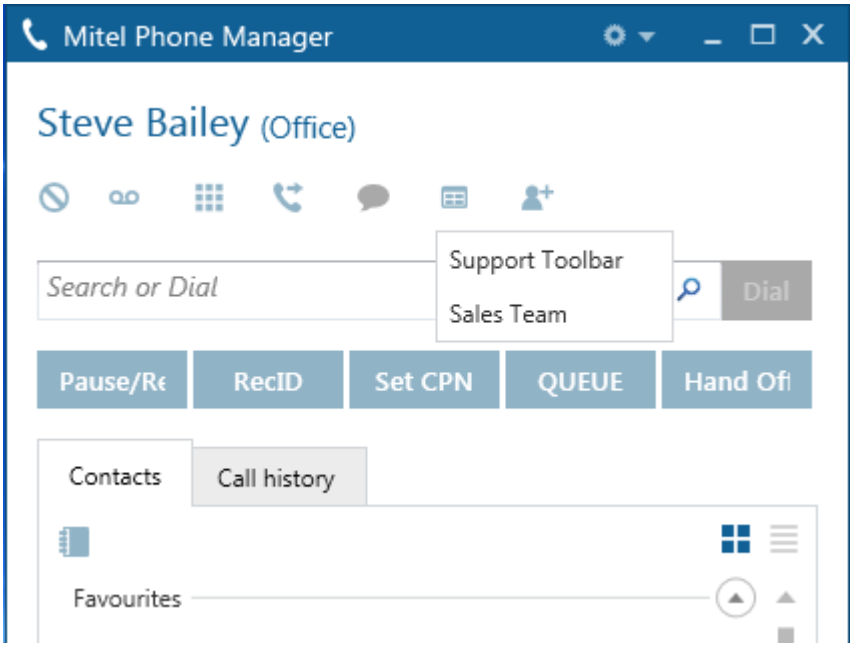
FAB {destination}	Sets a forward no answer busy to the *destination*.
TC {destination}	Performs a direct transfer to the *destination*
Xarios Call Recording Integration Arguments (require call recording integration to be enabled)	
TAG {field} {text}	Tags the call recording tag *field* with the *text* provided, overwriting any existing information in this tag field.
TAGAPPEND {field} {text}	Tags the call recording tag *field* with the *text* provided, appending this to any existing information in this field.
PR	Pauses the recording of the current active call at the endpoint.
RR	Resumes the recording of the current active call at the endpoint.

3.2 Toolbars

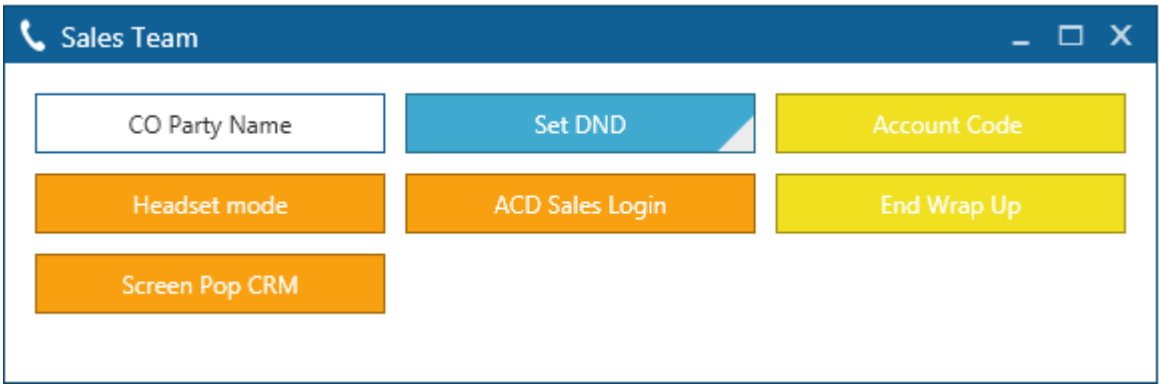
Overview

Toolbars allow the application to be configured so that commonly performed actions can be performed at the touch of a button. Specific functions can be programmed under a button such as answering a call, tagging a call recording, or a macro can be executed for more advanced tasks. Toolbars are configured on the server and assigned to specified Users.

When a toolbar is assigned they become available to the User to open in the *Toolbars* menu on the main window. (Phone Manager needs to be restarted to "read in" any new toolbar rights)



Multiple toolbars can be created with varying amounts of buttons that can have custom labels and be colors to highlight or categorize specific types of buttons. To open a toolbar select the entry from the toolbar drop down.

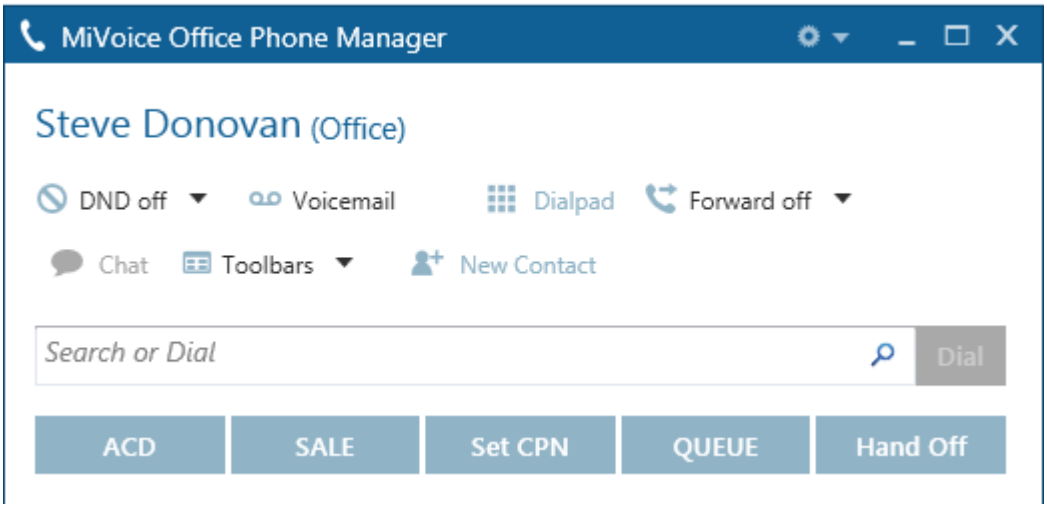


3.2.1 Integrated Toolbar

Overview

The integrated toolbar provides five buttons on the main window shown underneath the *Search or Dial* field. Each button can be customized by the User to set the label shown and what action is performed when the button is clicked.

This is only available when running with a Professional or higher license or when using the built in softphone.



Customizing Buttons

To edit the button:

1. Right click the button and select *Edit.*
2. Select the *Action* to perform from the Action drop down list. See the Button Actions section for details.
3. Enter the name that will be shown on the button in the *Name* field.
4. Configure any *Parameters* if required by the *Action* selected.

3.2.2 Button Actions

Overview

The buttons that can be used on a toolbar have different actions that can be performed when they are clicked. Depending on the action then additional parameters may need to be configured, or in some cases if they are not provided then the User will be prompted for these when they click the button.

Action	Parameters	Description
ACD end wrap	None	End the wrap state for this agent and place into the free state.
ACD status	Optional: *Huntgroup*	Logs the agent in to specified *ACD Huntgroup. I*f not specified then logs into all ACD groups. If already logged in, then toggles the state and logs the Agent ID out of the specified *Huntgroup*, if not specified then logs out of all groups.
Answer call	None	Answers a ringing call at the endpoint.
Change caller ID	Optional: *Number*	This changes the outgoing Caller ID (CLI) (or CPN in telephone system database programming) that is presented when outside calls are made from this endpoint. The feature needs to be enabled on the PBX and the number presented needs to be allowed by the network trunk line provider.
Clear call	None	Clears (or hangs up) the call that is connected to the endpoint.
Dial digits	Optional: *Digits*	Sends the specified *Digits* to the endpoint. If not specified then prompts the User for the digits.
Do not disturb (DND)	Optional: *Number* Optional: *Text*	If the endpoint is already in the DND state then DND is switched off. If not in DND then the endpoint is placed into DND using the message *Number* and the message *Text* if specified. If not specified then the User is prompted to enter text associated with the message.
Enable event driven macros	None	Enables or disables event driven macros.
Feature code	Optional: *Code* Optional: *Parameter*	This represents any feature code that is available on the MiVoice Office 250 PBX. The list of feature codes available is downloaded automatically from the MiVoice Office 250 PBX along with the description. This will set the feature *Code* specified or prompt the User to enter the feature code number. Some feature codes can accept additional *Parameters* and this can be configured but the User cannot enter additional parameters if not specified.
Headset mode	None	Enables or disables headset mode on the endpoint.
Hold call	None	Holds the call that is currently connected to the endpoint.
Make call	Optional: *Number*	Makes a call from the endpoint to the *Number*. If the *Number* is not specified then the User is prompted to enter a number.
Pause / resume call recording	None	This pauses or resumes the call recording for the active call

		on the endpoint. (Requires call recording integration to be enabled).
Play prompt	Optional: *CRA*	If the PBX has an IVR system connected then this will conference in the *IVR* device number configured into the current call.
Record current call	Optional: *Mailbox*	This initiates a Record-A-Call for this call and stores the recording in the MiVoice Office 250 *VoiceMailbox* provided. If no *Mailbox* is provided then the User is prompted to enter a valid mailbox number.
Redial	None	Performs a redial at the endpoint using the PBX redial feature code.
Retrieve call	None	Retrieves a held call at the endpoint.
Run executable	Required: *Path* Optional: *Arguments*	This enables any application installed on the PC to be run. The *Path* needs to be set to the full path and file name of the file to run and if there are any *Arguments* to pass then this can be configured.
Run macro	Required: *MacroID*	Runs the published macro with the *MacroID.*
Screen-pop application	Required: *AppID*	Runs the application support screen pop for the given *AppID*.
Send to voice mail	None	Sends the call ringing at the endpoint directly to voicemail.
Set account code	Optional: *Code*	Sets an account *Code* against the current call at the endpoint. If not specified then the User is prompted to enter a code.
Set account code on monitor	Optional: *Code*	When a supervisor is silent monitoring a call this will set an account *Code* against the call being monitored. If not specified then the User is prompted to enter a code.
Tag call	Optional: *Text*	Changes the top line display of the screen on a MiNet endpoint to the *Text* value, up to 16 characters. The text entered will then follow the call when transferred.
Tag recording	Required: *Field* Optional: *Tag*	Tags the call recording tag *Field* with the *Tag* provided, overwriting any existing information in this tag field. (Requires call recording integration to be enabled).
Transfer call	Optional: *Destination*	Performs a direct (blind) transfer to the *Destination*. If the *Destination* is not provided then the User is prompted to enter a destination.
Volume down	None	Decreases the volume at the endpoint. See Volume Control section for details.
Volume up	None	Increases the volume at the endpoint. See Volume Control section for details.

4 Team Leader Features

The following section covers the features that are available in the Team Leader licensed version of Phone Manager.

Alarm Notifications	Provides notifications to the User when any alarms are triggered on the system.
Hunt Group Status	Provides visibility of the status of a hunt group icon.
User Control	Ability to set the status of other devices, including ACD, DND and Forward state.
Silent Monitoring	Lets the Users control silent monitoring of Users. This requires specific programming on the PBX.

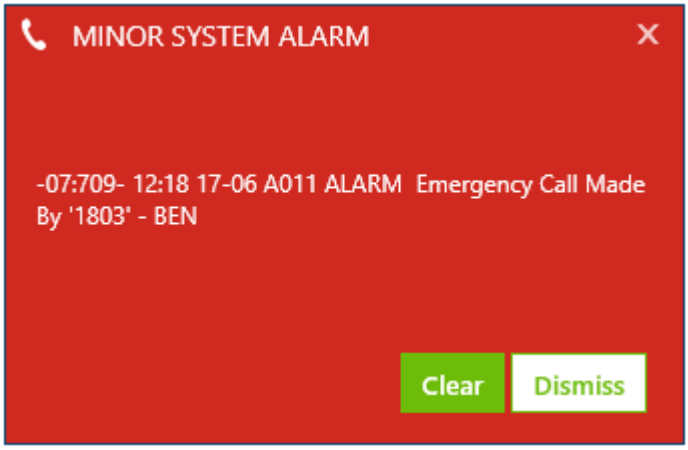
4.1 Alarm Notifications

Overview

Alarms generated on the PBX can be sent to Team Leader clients to notify them that they have occurred. Specified alarms that will be sent to the Team Leader Users is configured in the Alarms section on the server.

When an alarm is raised the client will display an alert window and the User can dismiss the alarm. The User may also be able to clear the alarm from the PBX if the endpoint they are associated with is programmed as an *Administrator*.

As an alternative to a pop up alarm form, the system can also send alarms by email.



4.2 Hunt Group Status

Overview

Team leader license Users can be provided with information about hunt groups. This gives the User details on the number of calls queuing and ringing at any hunt groups that they have in their contact list.

4.3 User Control

Overview

Team leader provides the User with the ability to control another Users endpoint and can perform silent monitor actions (requires MiVoice Office 250 programming to enable silent monitor permissions for the endpoint associated with the Phone Manager session). The control actions that are available are:

- DND control
  - Enabling and disabling DND
- ACD control
  - Logging agents out of ACD hunt groups
  - Logging agents into ACD hunt groups
- Forward state control
  - Setting forwarding
  - Removing forwarding
- Silent monitor (this is dependent on the PBX programming)
  - Start a silent monitor
  - Start a continuous silent monitor

To control another endpoint, from the Contacts window right click onto the device and this will display a menu where the action can be selected. Depending on the type of device and its current state the list of available actions may change.

5 Settings

Overview

The settings section on the client provides the User with the ability to be able to configure how the clients connects and interacts with the system. This includes the following options.

Connection	Configuration and connection settings for how the client will connect to the server from both local and remote locations and how their extension number is assigned.
Softphone	Options to configure the audio sources, codecs and quality of speech when Phone Manager is running in softphone mode.
Hot Keys	The hot key configuration and assignment.
Macros	Enabling event-driven macros and access the macro designer.
Application Support Plugins	Configuration of the plugins for CRM integration.
Diagnostics	Options for enabling diagnostics and troubleshooting.

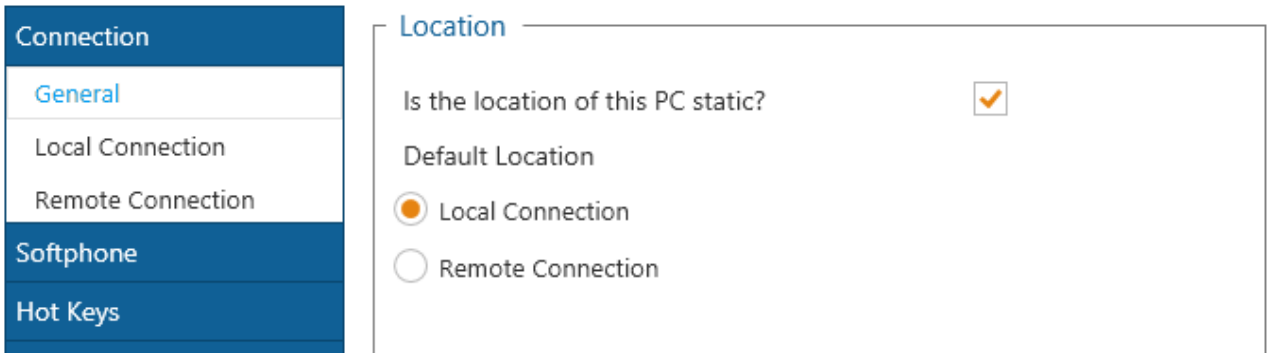
5.1 Connection

Overview

The connection settings enables the User to configure how the client will connect back to the server. The options shown here will have been pre configured during the installation process, see the Configuration section for more details, when the client was first installed and connected.

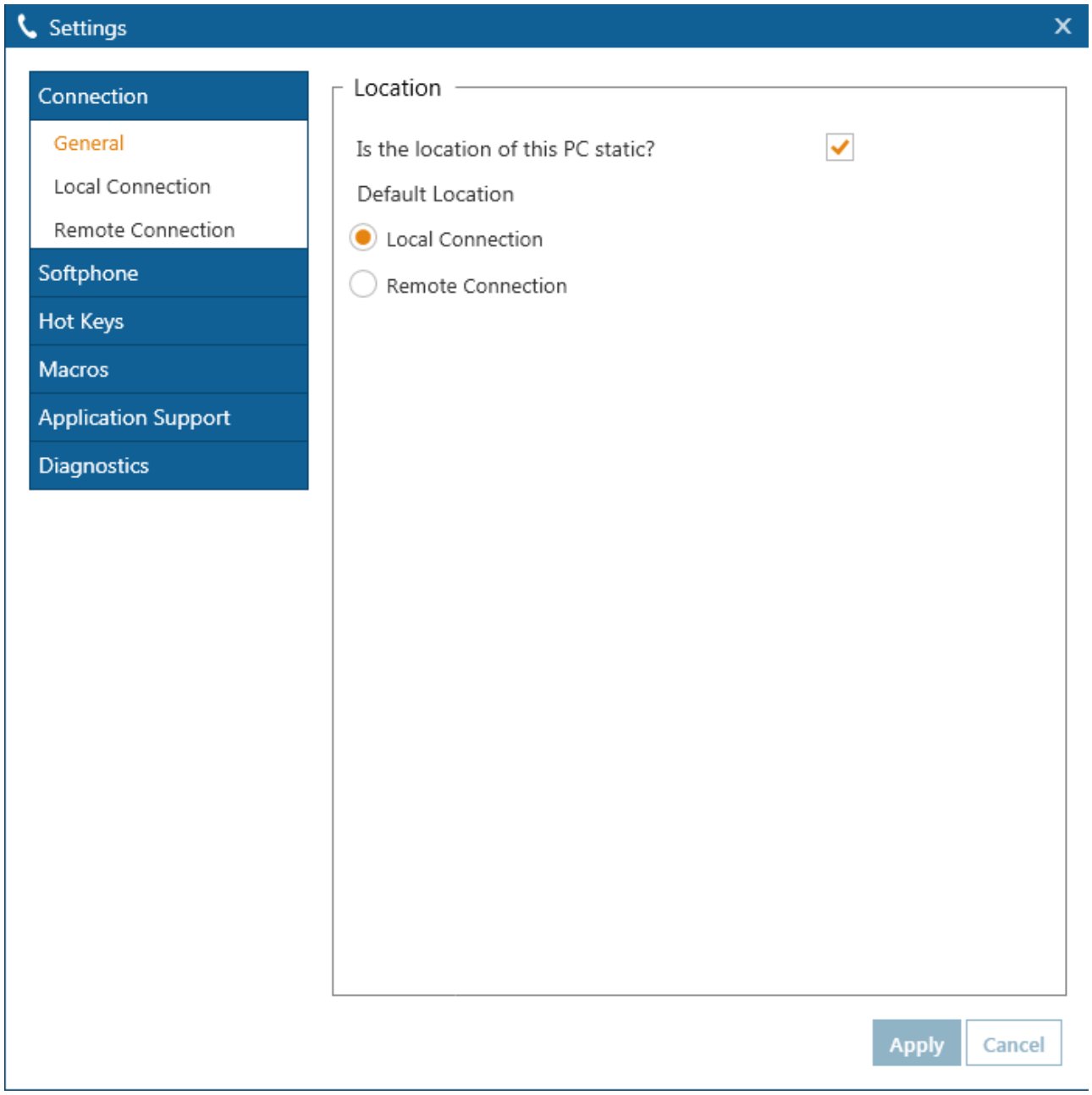
General

The general section configures how this computer will be used and the default options to connect.



If the PC that the client is installed on remains in the same physical location and uses the same connection details all of the time then check the **Is the location of this PC static?** option. This configures the client to always use the connection settings from the **Default Location**.

If the PC does move, for example this is a laptop, then uncheck the **Is the location of this PC static?** option. This will configure the client to always prompt for the location details to connect with each time that it starts. This is also an appropriate setting for use with a Terminal Server (TS) or Citrix Server.


Settings
Connection
General
Local Connection
Remote Connection
Softphone
Hot Keys
Macros
Application Support
Diagnostics
Location
Is the location of this PC static?
Default Location
Local Connection
Remote Connection
Apply
Cancel

5.1.1 Local Connection

Overview

The local connections settings configures how the client will connect when they use the local / office location to connect.

Server Connection

The **Available hosts** window shows a list of all the servers that the client has found by broadcasting on the local network. If the server is not on the same local subnet as the client then it may not be displayed. Selecting an entry from the **Available hosts** will populate the **Host address** entry or if the server is not shown then it can be entered manually.

The client will try and connect using the credentials of the User who is logged into the PC. If this is not correct then check the **Override login details** and enter the **Username** and **Password** details to use.

> If overriding a Windows account then enter the **Username** in the format DOMAIN\User.

Extension Details

The Extension details section controls what extension will be assigned to this client when it connects. There are 3 options available:

Always use the extension assigned to my user account

This will use the extension that has been configured against the User in the server. If this is selected but the User does not have an extension assigned then they will be prompted when they connect. The extension will then be permanently associated with the User. Any calls that are made on this extension even when the client is not running will be associated with this User. This means that they will be shown in the call history when the User next opens the client.

Everyone who uses this computer shares the same extension number

This will force each User who runs the client on this PC to use the extension number configured in the **Extension** field. The extension will only be temporarily assigned to the User while the client is connected. This means that any calls made on this extension when the client is not open will not show up on the Users call history. Calls made on the extension will be assigned to the User who's client is currently running.

This should be used when there are different Users using the same computer and extension at different times.

Everyone who uses this computer uses a different extension number (i.e. TS/Citrix/PBX hot desking)

This will prompt the User each time that the client starts for the extension number to use. The extension will only be temporarily assigned to the User while the client is connected. This means that any calls made on this extension when the client is not open will not show up on the Users call history.

This should be used when the client is installed in a multi user environment, for example Microsoft Terminal/Remote Desktop Services, Citrix XenApp, VMWare Virtual Desktop Infrastructure (VDI) or when using Agent Hot Desking.

5.1.2 Remote Connection

Overview

The remote connection settings configures how the client will connect when they use the remote location to connect. The same options as the Local Connection are available except for the broadcast options.

This simply means that we are telling the software that the connection to the server is via a different network to the server (usually the public internet if configured)

5.2 Softphone

Overview

The softphone settings enable the User to configure how the built in softphone operates and integrates with Phone Manager.

Phone Manager's softphone requires a CAT F SIP endpoint license on the MiVoice Office 250 PBX

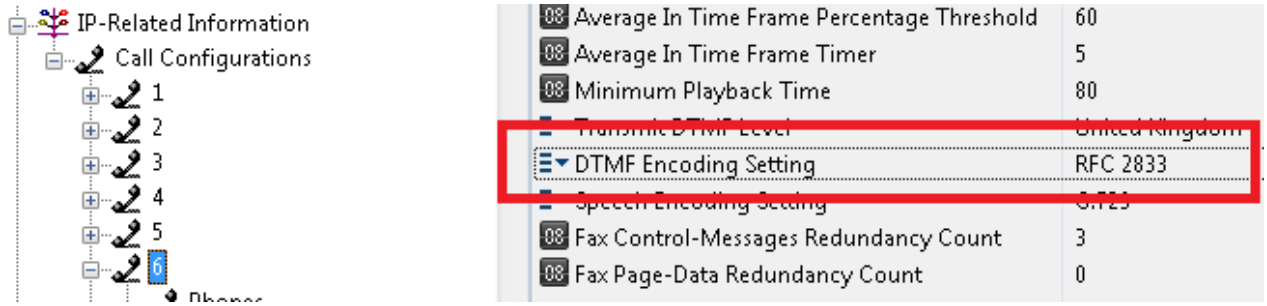
Before using the softphone please read and understand the issues raised in the E911 Warning, Emergency Calls and Security section and the limitations of using a softphone in the Softphone Limitations section.

This softphone has the following configuration sections.

General	Configuration of general settings.
Audio	Enables the audio sources for the speakers and microphone that are to be used by the softphone.
Codecs	Enables the audio codecs that will be available to the softphone.
Quality	Configures options relating to voice quality and echo cancellation.
NAT and Firewalls	Configures firewall and NAT configuration options when connecting remotely.

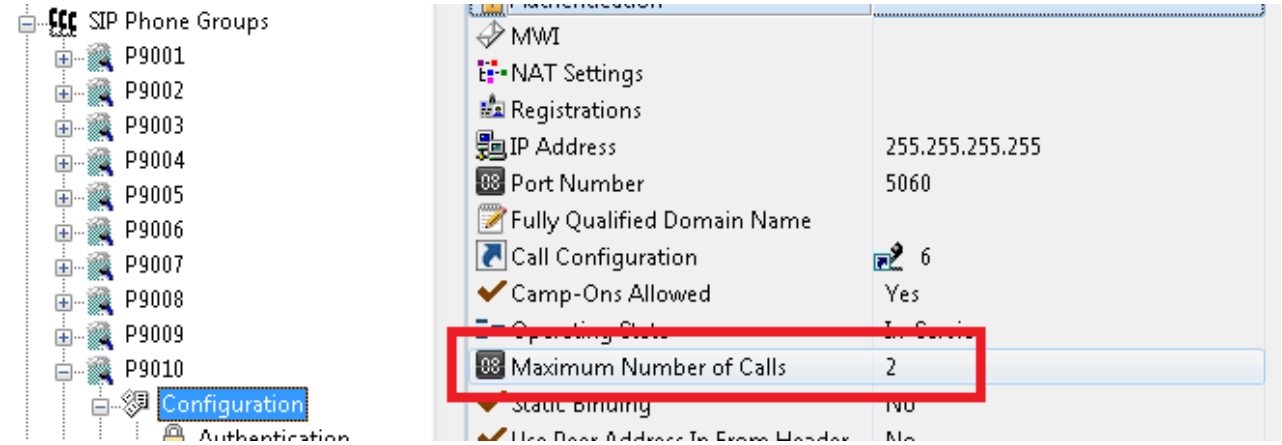
DTMF Support

The softphone only supports the RFC 2833 DTMF encoding and this needs to be configured within the MiVoice Office 250 DB Programming IP Related Information --> Call Configurations section for the corresponding SIP Phone Groups as shown.



Maximum calls

The softphone supports up to 2 concurrent calls, i.e. one call connected and another on hold. The number of maximum calls needs to be configured to 2 within the Mitel Database Programming as the default value for this is 1. This can be set in the SIP Phone Groups section for the endpoint as shown.



5.2.1 E911 Warning, Emergency Calls and Security

WARNING

Do not dial emergency hotline numbers from the Phone Manager SoftPhone when remote from the MiVoice Office 250 PBX. In the case of an emergency, dial the appropriate local emergency-service number directly, or use the nearest local public phone to dial an emergency hotline or use your cell phone mobile.

The SoftPhone communicates through a central telephone system that routes all emergency calls directly to a number that is local to the phone system. If the SoftPhone is not at the same address as the central system, then the emergency service call will not be routed to the proper location.

Therefore, if the SoftPhone does not stay within the premises of the central system, you must configure the SoftPhone's programmable keys to dial the local police or fire departments directly, and you must clearly label the key icons. If the SoftPhone is mobile, meaning it is used in multiple locations, you must know the direct emergency-contact numbers for each location.

In the case of an emergency, you are responsible for determining the nature of the emergency and dialling the appropriate emergency-service number directly. You must provide the emergency personnel your location and telephone number because the emergency service may not receive accurate Caller ID (CLI) or Calling Party Number (CPN) identification information automatically.

SECURITY

The implementation of SIP within the MiVoice Office 250 like many other systems is NOT based on a secure data connection using TLS and certificates, and by definition is not secure.

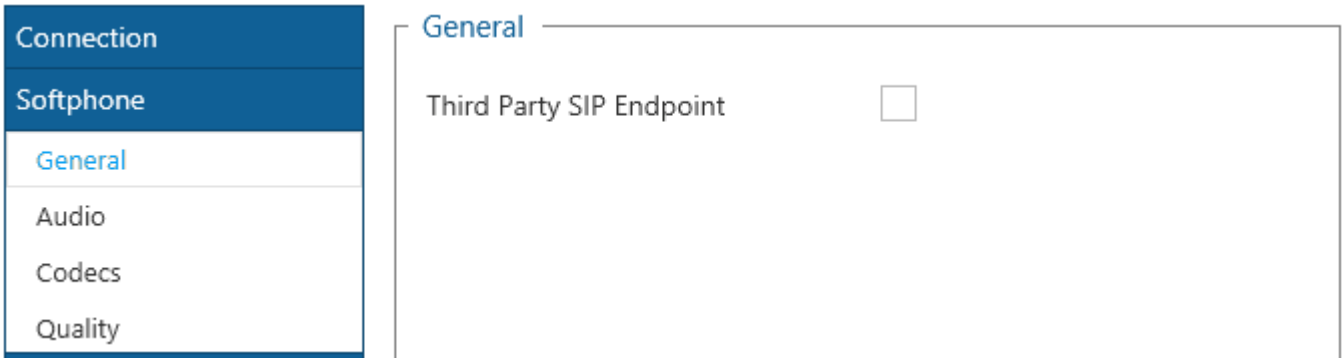
With this in mind when using SIP outside of your firewall infrastructure, ensure that every care is taken that a level of security is in place in line with your organisation's internal security policy. This could involve (but may be not limited to) using NAT or establishing a secure VPN connection between remote clients and the corporate LAN.

Should you be in any doubt please consult the relevant Mitel documentation on securing your MiVoice Office 250 installation for SIP endpoint communications.

5.2.2 General

Overview

The client has a built in SIP softphone but there maybe situations when a third party SIP endpoint, for example Xlite, Bria etc., needs to be used and associated with Phone Manager. When Phone Manager connects it automatically knows that the endpoint associated with the User is a SIP endpoint so will start the built in softphone and register the SIP device. Checking the **Third Party SIP Endpoint** option will prevent this from happening when it runs.

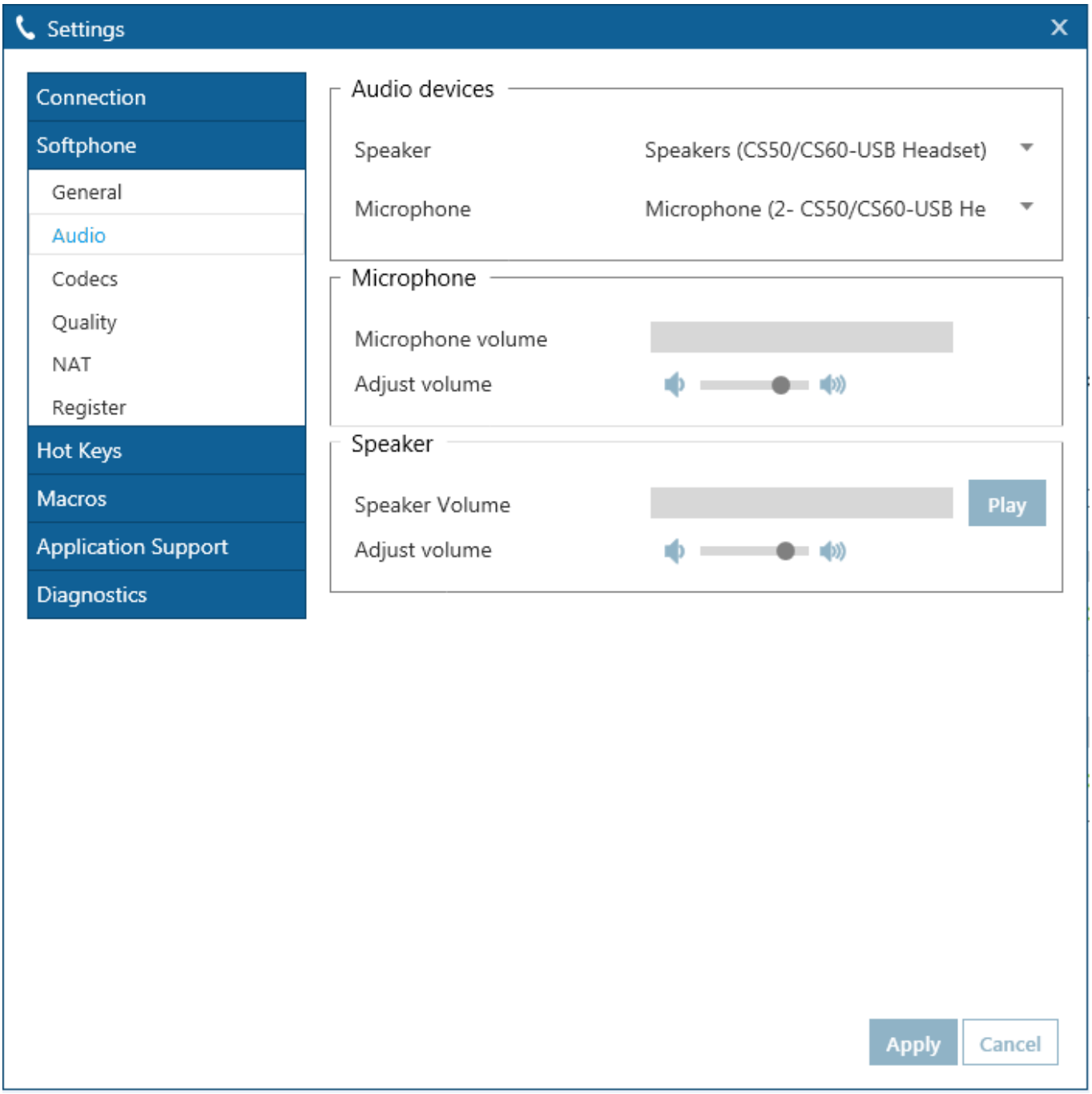


Using a third party SIP endpoint instead of the built in softphone will significantly reduce the features that are available since Phone Manager softphone uses the CTI connection to provide a more seamless experience for the User. See the Softphone Limitations section for details.

5.2.3 Audio

Overview

The softphone uses the microphone and speakers attached to the local computer to provide audio for the calls that are made. When the softphone starts it will try and use the first microphone and speakers that it finds. To override this selection select the **Speaker** and **Microphone** from the options available.

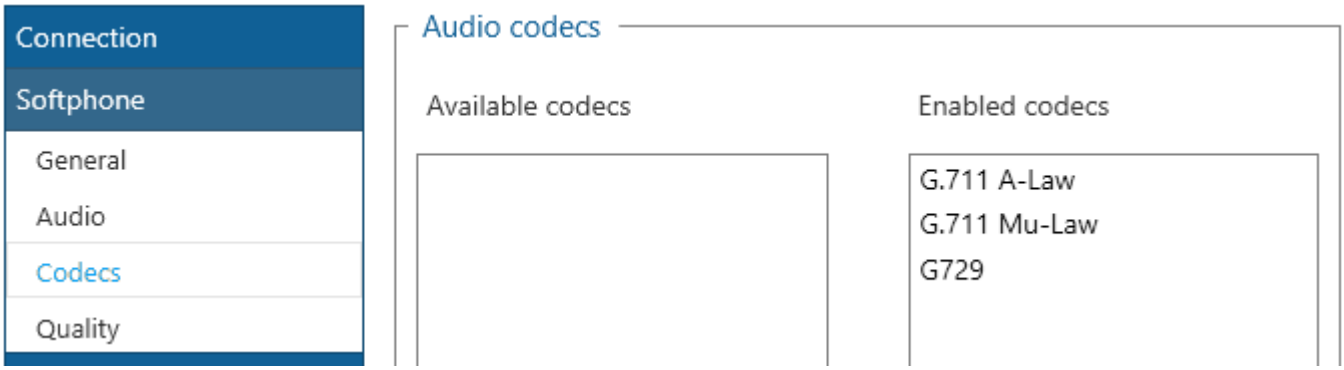


For both the speaker and microphone the volume levels can be adjusted and using the level indications you can see what impact changing this will have. To test the speakers click on the **Play** button and a message will be played back through the speaker selected. To test the microphone just speak into the microphone.

5.2.4 Codecs

Overview

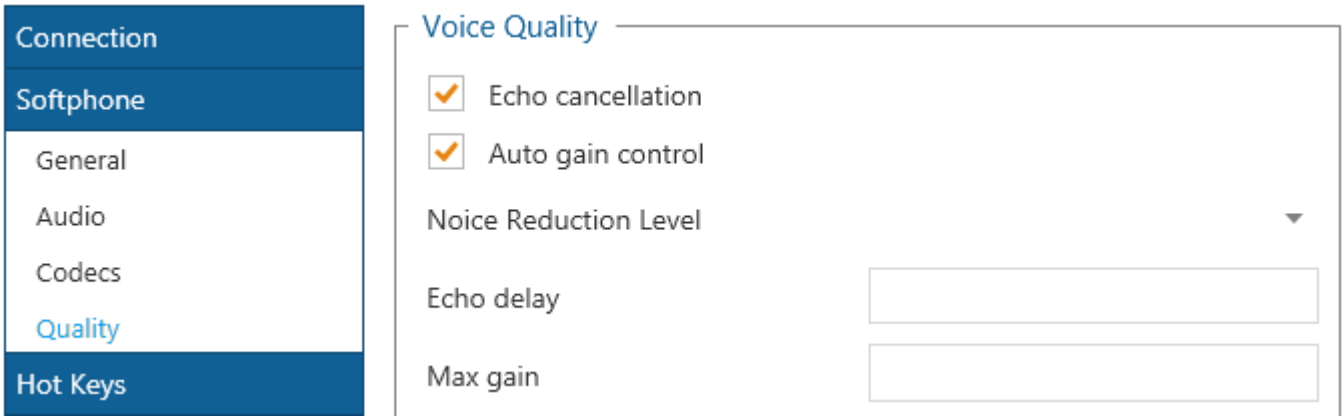
The softphone supports several different audio codecs that can be used depending on the quality of the audio required and the amount of network bandwidth available. By default the softphone supports G.711 A-Law, G.711 Mu-Law and G729. The softphone will negotiate with the PBX to determine the one to use based upon what is programmed on the PBX.



5.2.5 Quality

Overview

The softphone can be configured with different audio quality settings depending on the environment that the softphone is operating in. In most circumstances the settings should be left at the default.



Echo cancellation provides a way of automatically removing echo from the call, for example echo can occur when using a loud speaker and the microphone may pick up the audio from the speaker. Removing the echo will also minimise the network bandwidth used as the silence suppression will prevent the echo from travelling across the network. The **Echo delay** configures the delay of the acoustic echo in milliseconds.

Auto gain control provides a way of balancing out the volume levels to provide an average level without excessive highs or lows. The **Max gain** setting configures the maximum volume level permitted in decibels.

Noise reduction level configures the amount of noise reduction that is used. Background noise or random white noise can be reduced using these options. The extent of reduction can be controlled from **No Reduction**, **Low**, **Medium** or **High**.

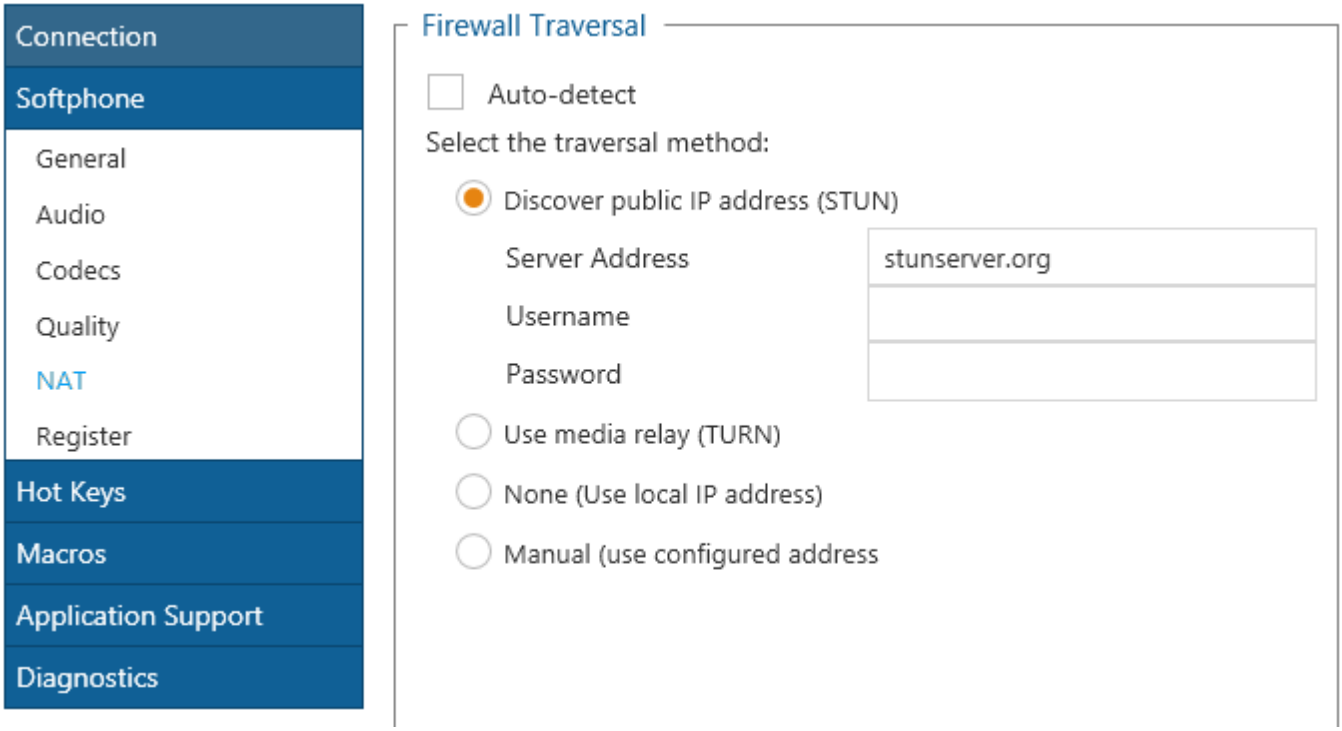
The softphone uses a dynamic jitter buffer to handle out of sequence and delayed voice packets to increase quality. This is always on and cannot be disabled.

5.2.6 NAT and Firewalls

Overview

Using a softphone remotely causes the voice traffic to have to flow through multiple switches, routers, firewalls etc. to reach its destination. This can cause audio problems as the devices that handle the voice packets may use a process called NAT traversal. NAT traversal is a standard technique for establishing and maintaining connections between remote devices on different networks, i.e. the softphone and the PBX.

This is important because there is no single method for working with NAT that is successful in every scenario. There are several different options that the softphone supports. Essentially each method is trying to establish which public IP address to use as the destination for the voice packets.



Session Traversal Utilities for NAT (STUN) is a standardized set of methods, including a network protocol used in NAT traversal for applications of real-time voice, video, messaging, and other interactive IP communications. STUN is an acronym for Session Traversal Utilities for NAT, and is documented in RFC 5389.

Traversal Using Relays around NAT (TURN) is a protocol that allows for an element behind a Network address translator (NAT) or firewall to receive incoming data over TCP or UDP connections. It is most useful for elements behind symmetric NATs or firewalls that wish to be on the receiving end of a connection to a single peer. TURN does not allow for users to run servers on well known ports if they are behind a NAT; it supports the connection of a user behind a NAT to only a single peer.

None where no NAT traversal method is used but this can only be used for connections where the server and client are on the same local network.

Manual where the public IP address to use is manually configured.

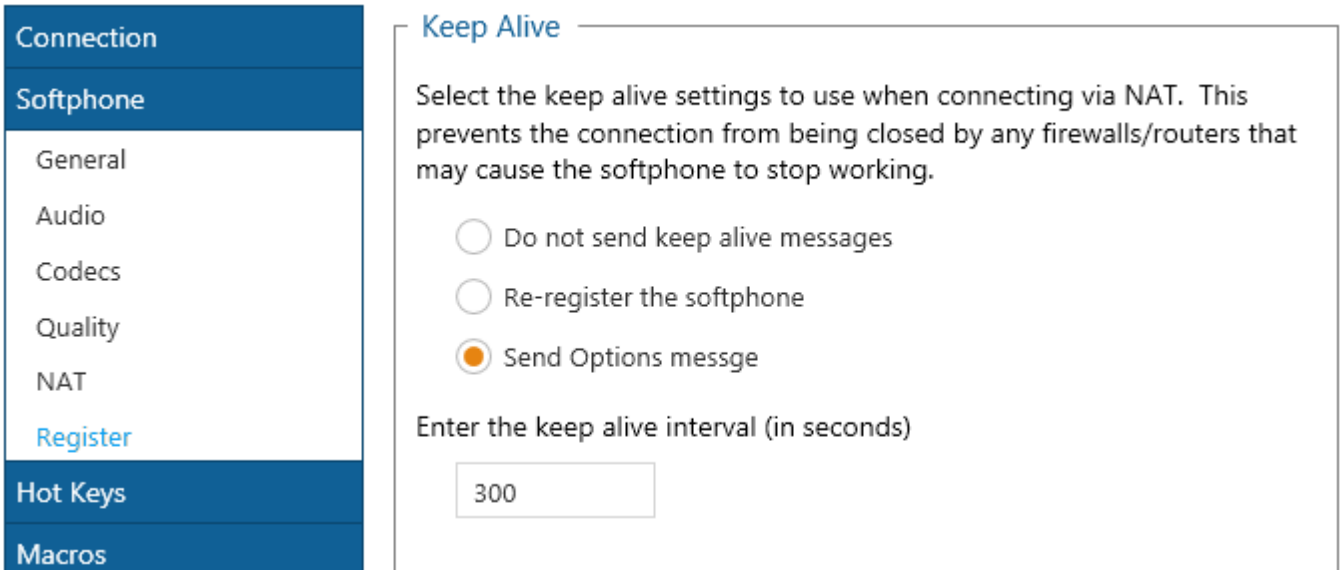
Auto Detect where the softphone attempts to automatically determine the type of method to use but if this fails then will fall back to the configured option.

This is not just an issue with the built in softphone but any SIP endpoint.

5.2.7 Keep-Alives

Overview

The softphone supports sending keep-alive requests back to the PBX. This prevents the network connection from being closed by any firewalls/routers that may cause the softphone to lose communication when connecting via NAT.



There are three keep-alive options available that can be used depending on the network configuration.

Do not send keep alive messages: This disables any keep alive messages from being sent.

Re-register the softphone: This re-sends a SIP Register request to the PBX.

Send Options message: This sends a SIP Options request to the PBX.

When keep alive requests are being sent, the time interval can be set to determine how often they are sent out. The default is every 300 seconds or 5 minutes.

5.2.8 Softphone Limitations

Overview

The softphone does not have access to all of the same features as a Mitel MiNet device (or desk phone). The following limitations apply to the all SIP devices on the MiVoice Office 250 PBX:

- No ACD support, i.e. cannot login an ACD agent.
- Redial is not supported (feature code 380).
- Mute causes both parties audio to be muted out, unlike with a MiNET device where only the Mitel endpoint audio is muted.
- Mitel Hotdesk
- Unable to transfer a connected call straight to a Voicemail box

In addition to this the following restrictions apply to using a third party SIP endpoint (i.e. not the in built softphone):

- Cannot make a call using Phone Manager, this means features like highlight and dial and TAPI will not work.
- Cannot place a call on hold or retrieve using Phone Manager.
- When making a call via the SIP endpoint the dial prefixes need to be set by the User, i.e. a user has to manually enter the digits for an outside line.

5.3 Hot Keys

Overview

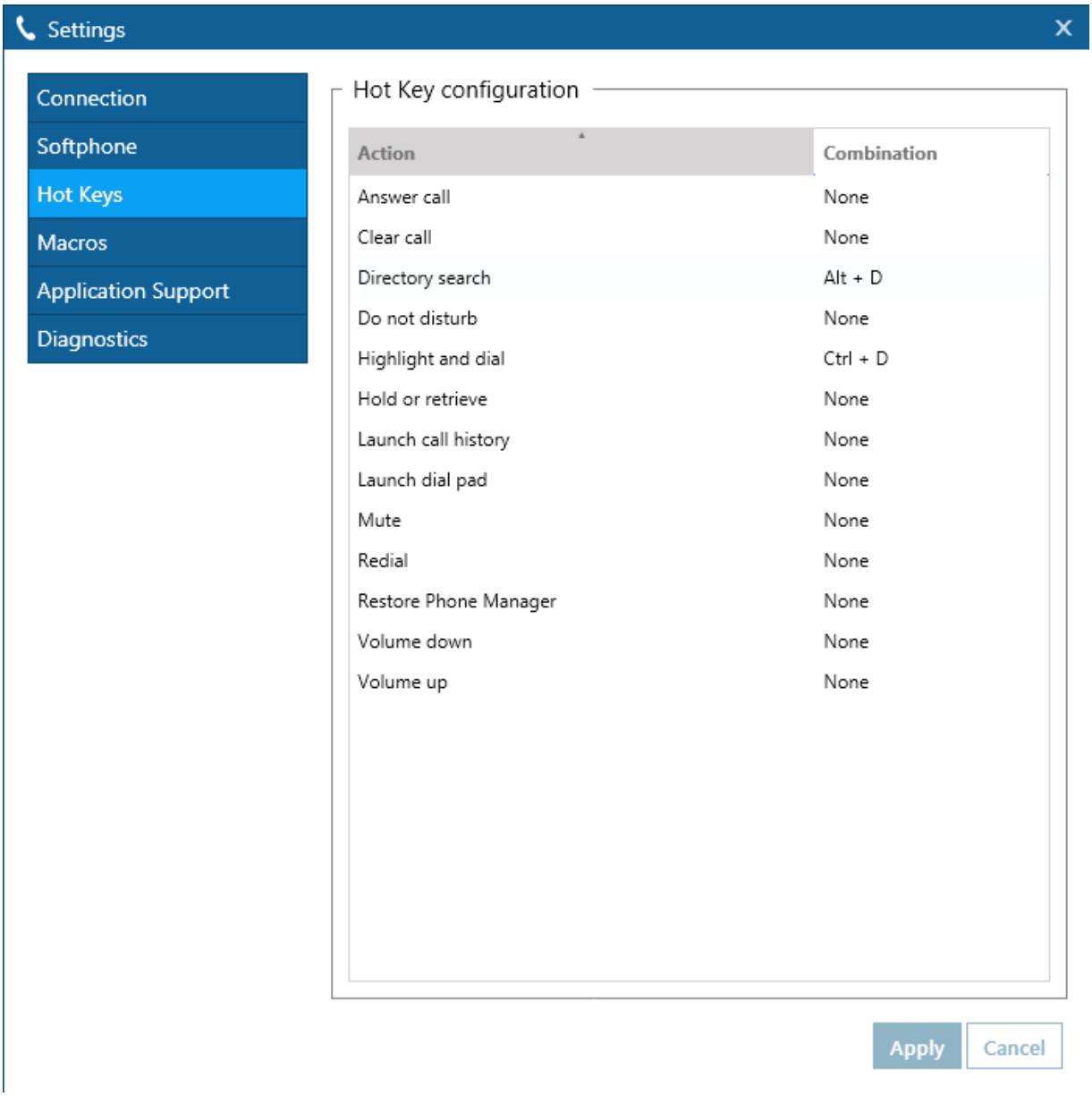
Hot Keys enable Users to set a combination of keystrokes to access commonly used features within Phone Manager. The configuration of the hot keys is specific to each User. The following list of hot key actions are supported:

Action	Description
Answer call	Answers the call currently ringing. If there are any calls in progress then this is ignored.
Clear call	Clears the call that is connected to the endpoint.
Directory search	Brings the main window to the front and sets the focus and cursor to the *Search or Dial* field.
Do not disturb	Toggles the DND state at the endpoint. If no message is pre configured then it will prompt for the message to use.
Highlight and dial	Dials the number that is currently highlighted in other applications.
Hold or retrieve	If a call is on hold then retrieves the call otherwise puts it on hold.
Launch call history	Brings the main window to the front and sets the call history tab in focus.
Launch dial pad	Shows the dial pad window.
Mute	Mutes the audio for the current call. If this is a softphone then both sides of the call are muted otherwise only the audio from the Users endpoint is muted. See Softphone Limitations.
Redial	Redials the last number using the Mitel feature (default code 380). Not supported on softphone (use call history instead), see Softphone Limitations.
Restore Phone Manager	Brings the main window to the front.
Volume up	Increases the volume level. See the Volume Control section for details.
Volume down	Decrease the volume level. See the Volume Controlsection for details.

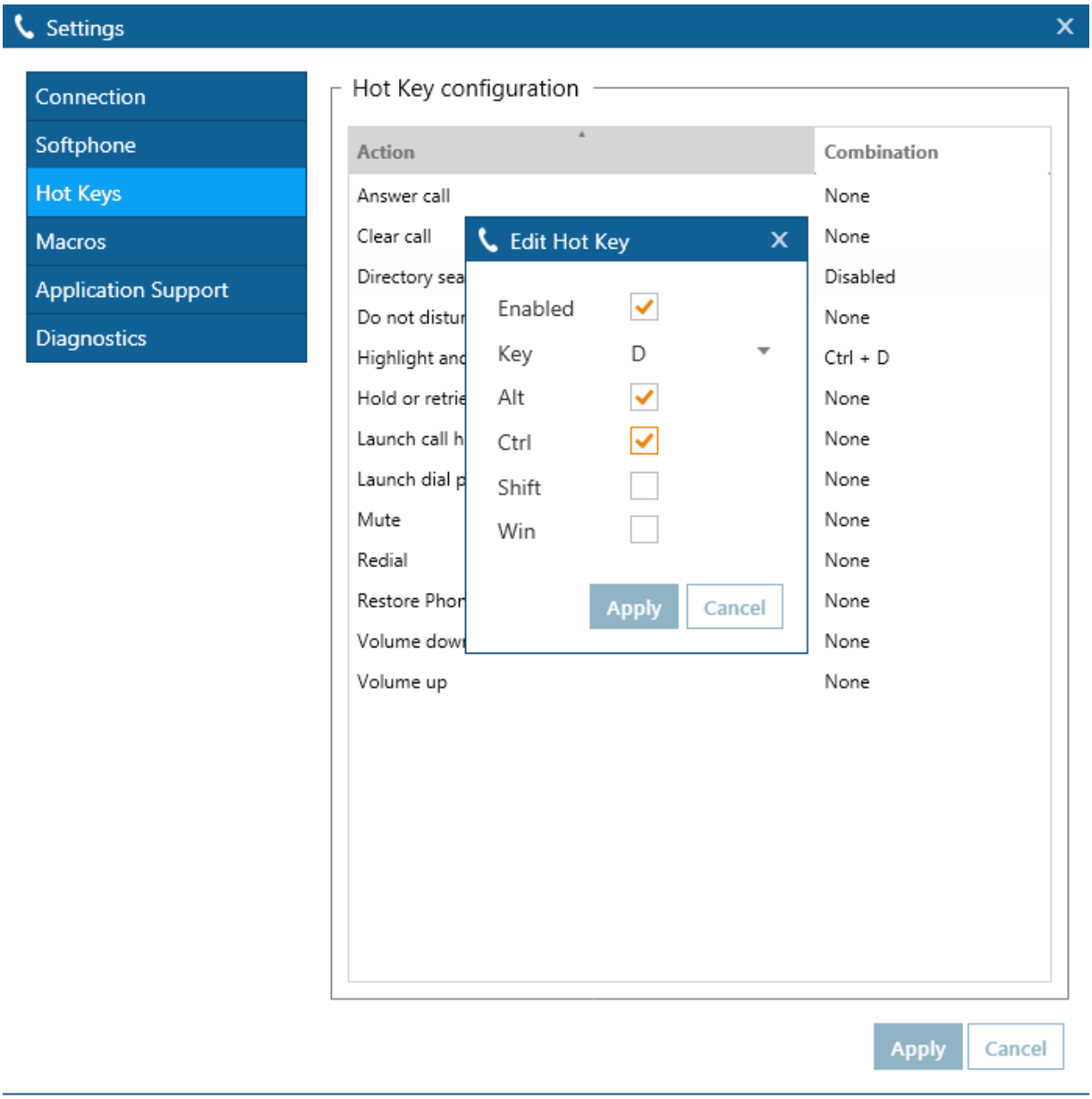
Configuration

To configure the hot keys:

1. Open the *Settings* window.
2. Select the *Hot Keys* tab.



3. Double click on the hot key entry to configure.



4. Each hot key needs to be enabled, check the **Enabled** option to do this.
5. Select the **Key** to use for the hot key.
6. Check the **Alt**, **Ctrl**, **Shift** and/or **Win** checkbox's that will be used in combination to the **Key** selected.
7. Click on **Apply** to save the changes/

⚠ Always configure the hotkeys to use at least 3 combinations, for example Alt + Ctrl + D. Using simpler combinations may result in conflicts with other application that are running at the same time.

5.4 Macros

Overview

Phone Manager Professional license supports a scripting interface to allow VBScript macros to be developed. They can then be configured to trigger on a manual User action, i.e. a toolbar button action, or automatically on pre-defined call events. The scripting interface provides access to the call information that can be used within the script and extra methods to control the endpoint and other features, i.e. call recording.

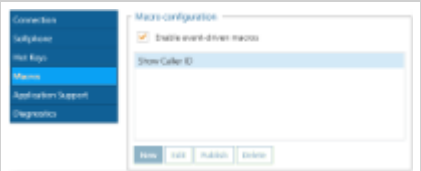
For example this VBScript example will display a message box when an incoming call is received and display the caller id:

```
MsgBox "Call from " & PhoneControl.CLI
```

See the Phone Manager Macro API reference for more information.

Configuration

The macro design and configuration is available for Users who have the *Allow macro editing* option enabled on their *Client Profile* on the server. WIthout this option Users can only change the **Enable event-driven macros** option. This controls if the macros that have been assigned to the User will be triggered on the associated call events.



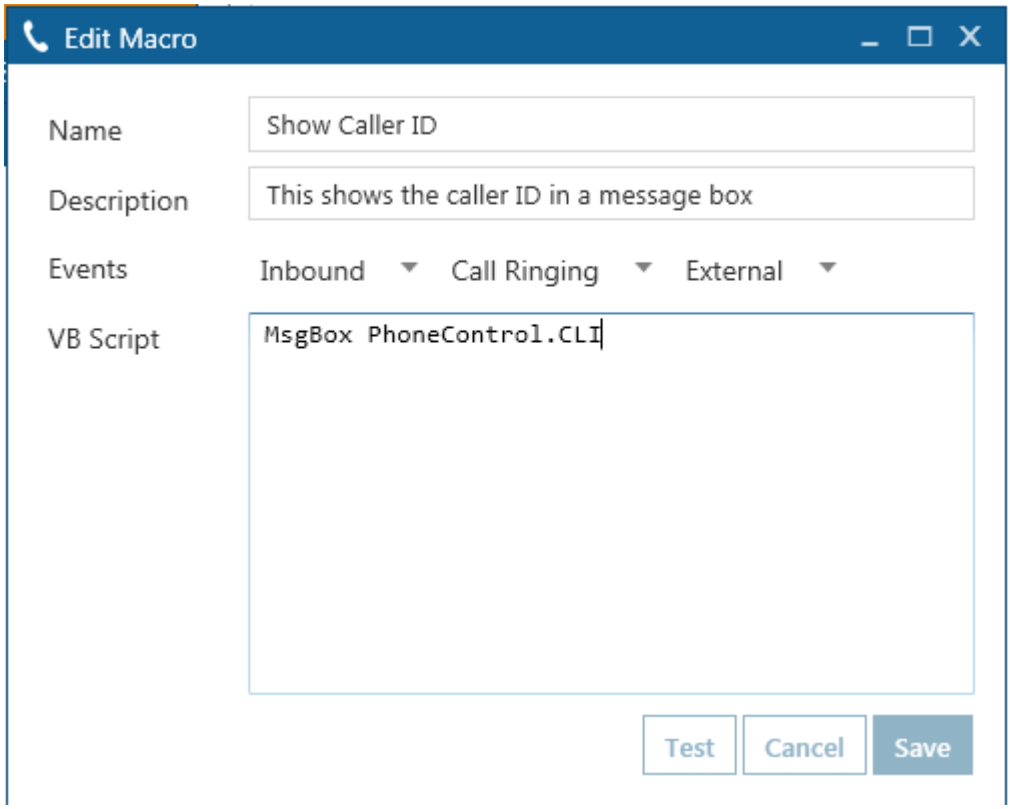
Macros

When creating new macros they are first designed and tested from within this section. When this is complete they can be published and this makes them available on the server. Once published they can then be assigned to the relevant Users. A copy is made of the local version of the macro and this can then not be edited. Any updates would need to be made on the original local version and then re published. Users would then need to be reassigned to this new published version. This provides a level of security to prevent macros being deployed without permission.

The list of macros shown in the *Macro Configuration* section only shows the local macros not published to the server for this User. To see the list of published macros see the *Macros* section on the server user interface.

To create or edit a new macro:

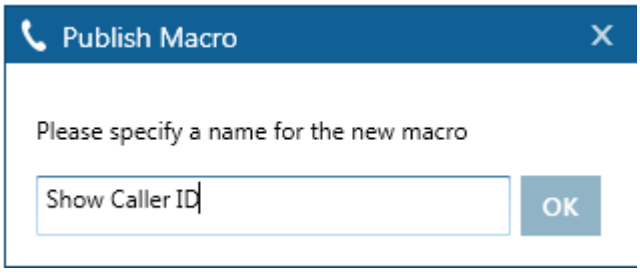
1. Click on the *New* or *Edit* button.



2. Enter a **Name** that will be used on the server to identify this macro.
3. Enter a **Description** that can be used to detail what this macro is for.
4. Select the call event to automatically trigger the macro.
    - Direction: inbound, outbound or both.
    - State: call ringing, call answered, call cleared, call cleared only when answered or user controlled (i.e. via a toolbar button).
    - Type: external, internal or both.
5. Enter the macro text in the **VB Script** section.
6. Use the **Test** button to validate the syntax. If there are any errors then a message box will be displayed indicating the error.
7. Click on **Save** to save this macro.

To publish a macro:

1. Select the macro from the list of macros available.
2. Click on **Publish**.



3. Enter a new name for the macro, it is recommend to include a version or revision number.
4. Click **Ok**
5. From the server user interface, assign this to the relevant Users.

To delete a published macro:

1. From the server open the Site -> Features -> Phone Manager -> Macros section

2. Select the macro and click on **Delete**.

5.5 Application Support Plugins

Overview

Phone Manager Professional License contains plugins available that are able to directly integrate with a range of well known CRM and PIM applications. The plugins generally provide deeper, more seamless integration than other methods as they leverage the APIs of the specific application.

Features

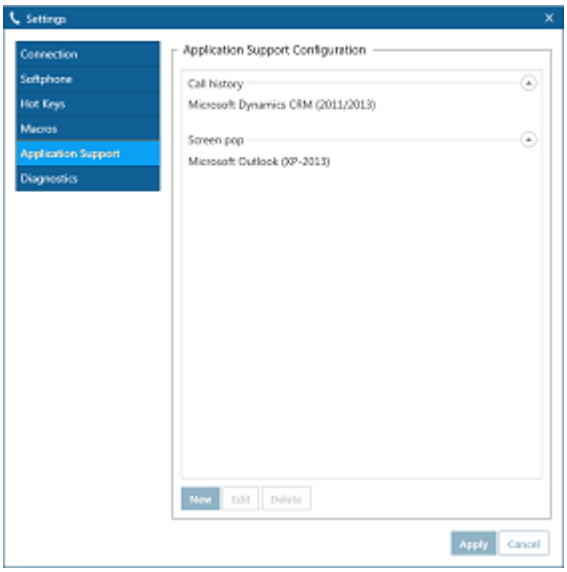
There are 4 features that the plugins can provide. Depending on the application that is being integrated with, only some features may be available with varying levels of support and there may need to be integration work performed by the application vendor or administrator of the system. See the application integration document for the specific plugin for details.

- **Dial out directly from the application**: For example having a dial button next to a telephone number field.
- **Screen popping**: Searching the application for contacts that have matching caller ids and displaying the record.
- **Call history**: Creating a call history phone call activity in the application with the call details.
- **Calendar and DND synchronisation**: Controlling the DND state of the endpoint based upon calendar entries in the application.

Configuration

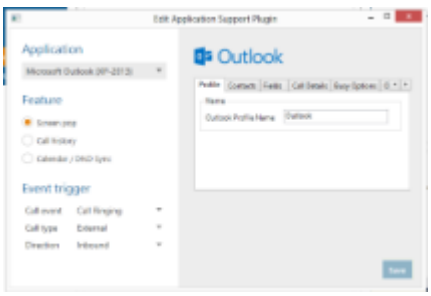
To configure a plugin for one of the application support features:

1. From the Application Support Configuration section.



Plugins

2. Click on the **New** button.



Plugin configuration

3. From the list of **Application**s select the application to integrate with.
4. This will then change configuration on the right hand side to show the specific configuration required for this plugin. See the relevant integration document for details.
5. Select the **Feature** to enable either:
    - Screen pop
    - Call history
    - Calendar / DND sync
6. Multiple features can be enabled for each plugin by repeating the process from step 1.
7. Select the event trigger that will cause the feature to be acted on (this is not applicable to Calendar / DND sync).
    - Direction: inbound, outbound or both.
    - State: call ringing, call answered, call cleared, call cleared only when answered or user controlled (i.e. via a toolbar button).
    - Type: external, internal or both.
8. Click on **Save**.

5.5.1 Goldmine

Overview

This describes the features that are available when integrating with Goldmine.

Supported Versions

The following Goldmine versions are supported.

Version	Supported
Goldmine v7.0 (SQL)	✓
Goldmine v8.0 (SQL)	✓
Goldmine v9.2 (SQL)	✓
Goldmine v2013.1 (SQL)	✓

Features

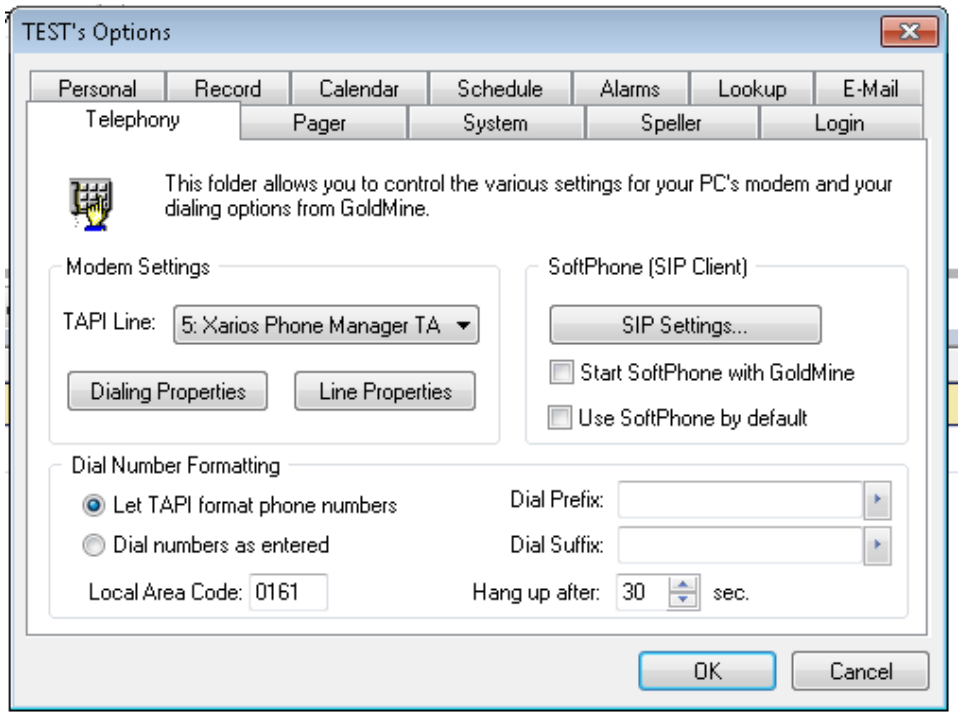
Integration with Act! supports the features listed below:

- Click to dial
- Screen pop for contacts
- Automatic call history entry
- Calendar & DND synchronisation

Click to dial

Goldmine supports dialling out directly from a Contact using the highlight and dial feature or using TAPI.

To configure this within Goldmine from the *Tools -> Options* menu select the Telephony tab as shown.



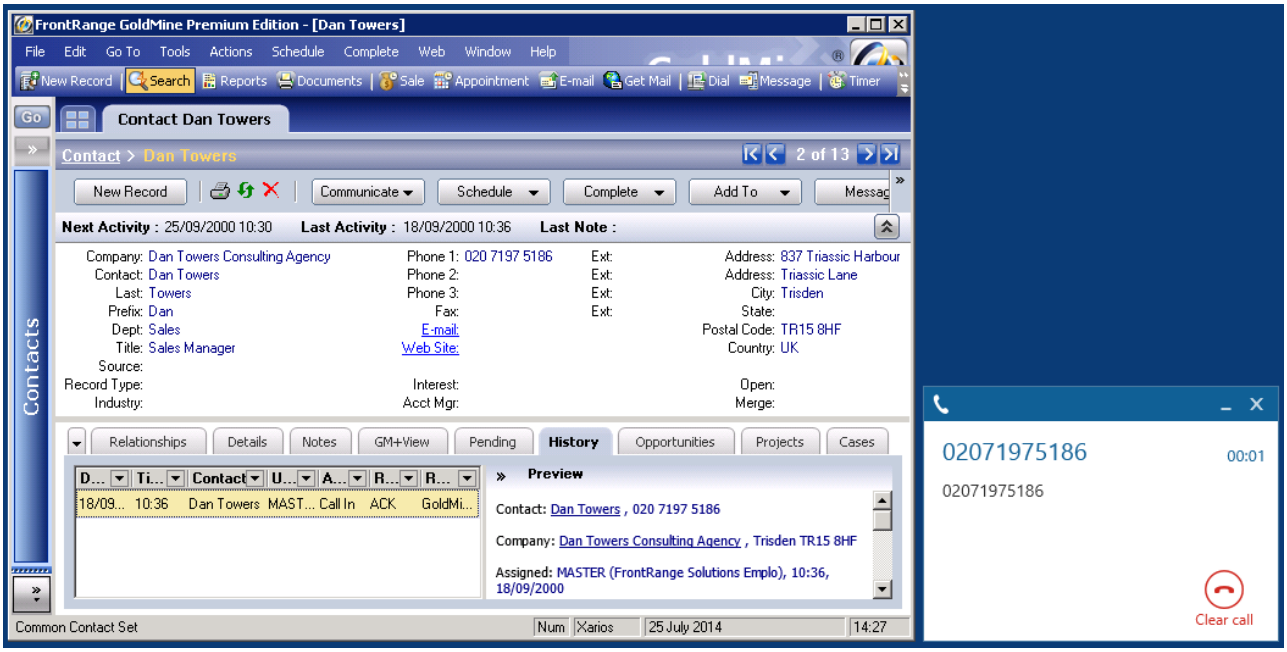
Then select the Xarios Phone Manager TAPI option from the TAPI Line drop down box in the Modem Settings. Contacts can then be dialled by either right clicking on the Phone description field (i.e. Phone 1, Phone 2 or Phone 3) and selecting Dial or

clicking on the button from the toolbar menu – this dials the Phone 1.

> ⚠ See the Phone Manager User Guide for TAPI requirements

Screen pop for contacts

The Goldmine contacts can be screen popped directly within Goldmine when an incoming call is received using the caller id or from an outgoing call using the dialled number. The telephone number is then used to find any matching contacts that have this number. For example an inbound call is received from 02071975186 as shown on the toaster. The plugin performs a search on the contacts to find any records that have matching telephone numbers. A match was found and the contact record was automatically displayed.



If multiple matches are found then the first Contact found with this telephone number will be displayed.

Contact fields

The range of telephone numbers that are to be searched for can be configured. By default the common telephone number fields are pre selected.

Field Name	Enabled?
Account Number	✓
Phone 1	✓
Phone 2	✓
Fax Number	✓
All Telephone Fields	✓

Telephone number formats

Goldmine does not provide a standard format for storing telephone numbers within the system by default. The plugin supports searching for multiple different formats dependent on the region (UK or US) where the client is running. The default formats for the UK and International are shown below. This is based on the number 08001831234 been searched for.

UK & International Telephone Formats			
08001831234	(0123) 4567890	44 (08001)831234	+44 (080)0183 1234

08001 831234	08001-831234	(08001)831234	(08001)-831234
080 018 31234	080-018-31234	080 0183 1234	080-0183-1234

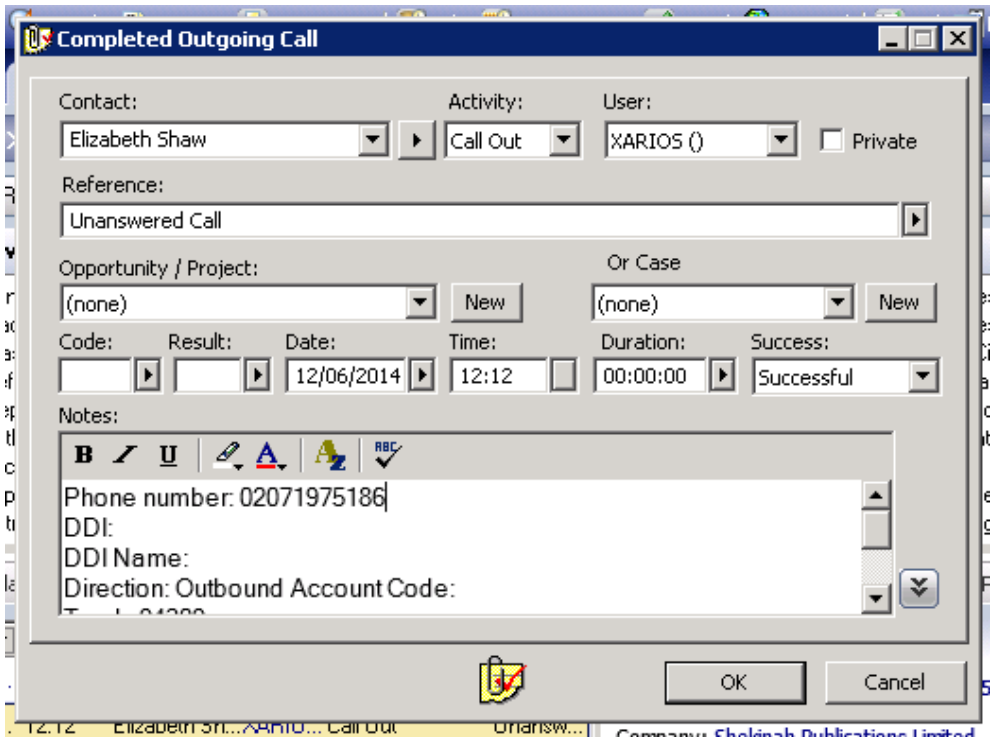
The default formats for the US are shown below. This is based on the number 9876543210 been searched for.

US Telephone Formats			
9876543210	987.654.3210	+1 (987) 654-3210	19876543210
987-654-3210	(987) 654-3210	1-987.654.3210	1-987-654-3210
1(987) 654-3210			

Automatic call history entry

Phone Manager can work with the History within Goldmine and can have *Call Completed* entries automatically created for calls made or received by the User when a match has been found to an entry in their contacts. The contact to associate with this is found using the caller id received or dialled number.

The notes section of the call entry is populated with the information shown.



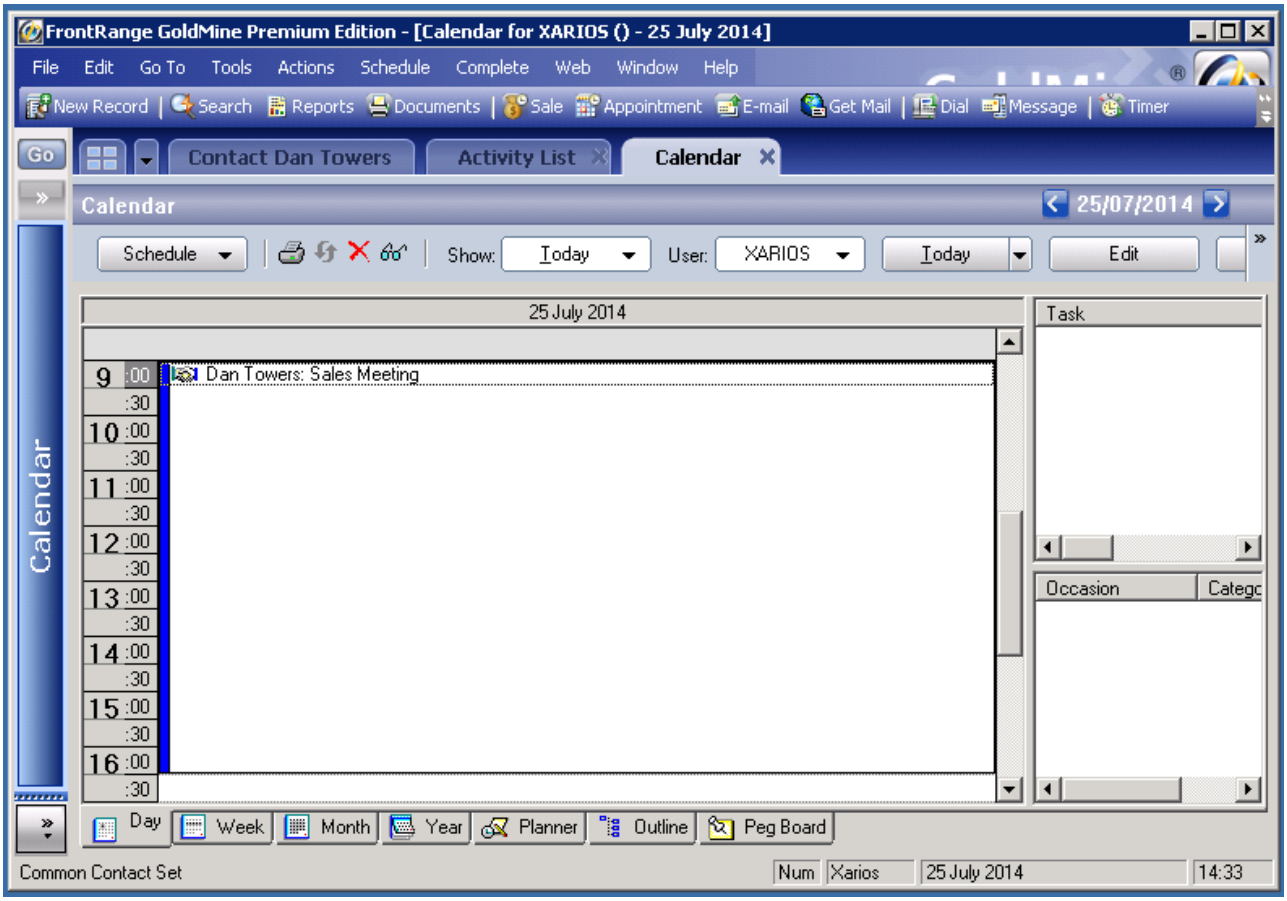
Phone number	For inbound calls this is the caller ID and for outbound calls this is the dialled number.
DDI/DID	For external inbound calls only, the DDI/DID number that the call came in on.
DDI/DID Name	For external inbound calls only, the DNIS of the DDI/DID that the call came in on.
Direction	The direction of the call.
Account Code	The account codes that was set on the call.
Trunk	For external calls the outside network trunk number that the call was made or receivec
Transferring Extension	The device that the call was transferred from.
Duration	The duration of the call. The call event trigger must have been set to Call End as they not known until the call is cleared.
Call Recording	If integrating with a Xarios Call Recorder then this can contain a URL link to the call recording (this is not a clickable hyperlink but can be copied and pasted into a browser

	The call event trigger must have been set to at least Call Answered as the call recorde only create the recording id when the call has been answered.

Calendar & DND synchronisation

The calendar within Goldmine can be synchronised with the DND status of the endpoint of the User. For example when there is an appointment in the calendar and this is due the endpoint can be automatically placed into DND with the DND text set to the *Reference* field of the appointment. When the appointment ends, the endpoint will be automatically removed from DND.

For example the *Appointment* entry below will place the Users endpoint into DND between 09:00 and 16.30 with the DND text set to "Sales Meeting".



Configuration

The integration needs to be configured for the correct version of Goldmine that is running. From the *Version* tab select the relevant entry from the drop down list.

GoldMine
Settings
Fields
Version
Goldmine v2013.1 (SQL)

5.5.2 Microsoft Outlook

Overview

This describes the features that are available when integrating with Microsoft© Outlook©.

Supported Versions

The following Microsoft© Outlook© versions are supported.

Version	Supported
Outlook© 2010 32bit	✓ [1]
Outlook© 2010 64bit	✓ [1]
Outlook© 2013 32bit	✓ [1]
Outlook© 2013 64bit	✓ [1]
Outlook© 365	✗
Business Contact Manager for Outlook©	✓

[1] Desktop client for Microsoft© Windows

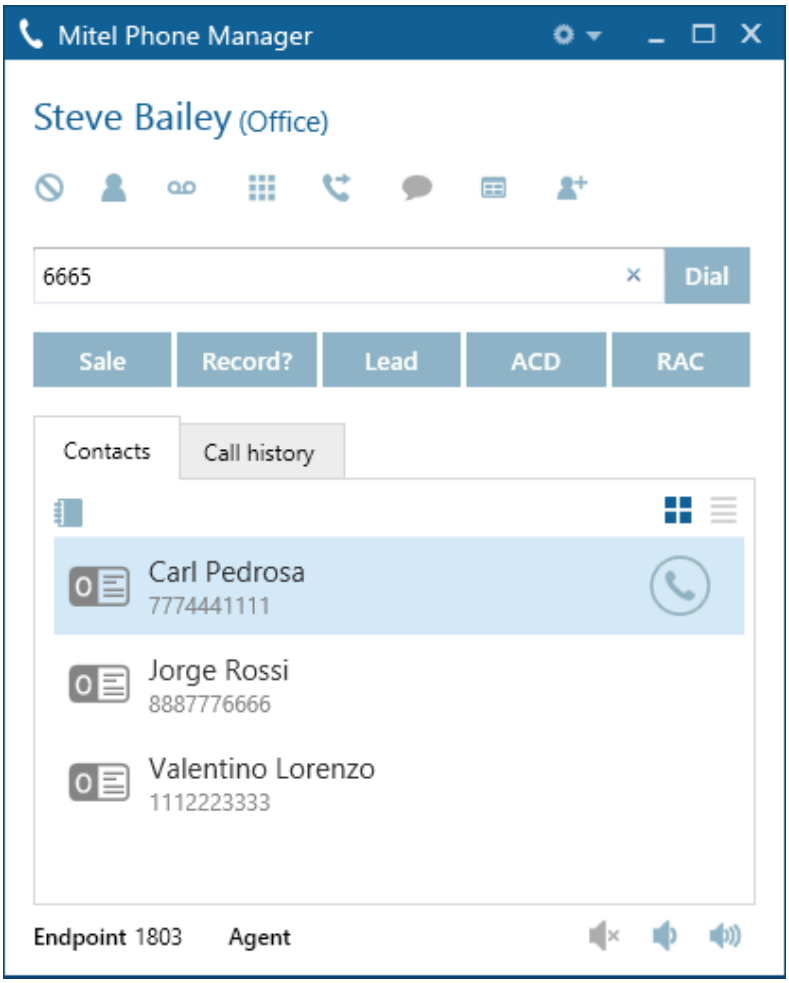
Features

Integration with Microsoft© Outlook© supports the features listed below:

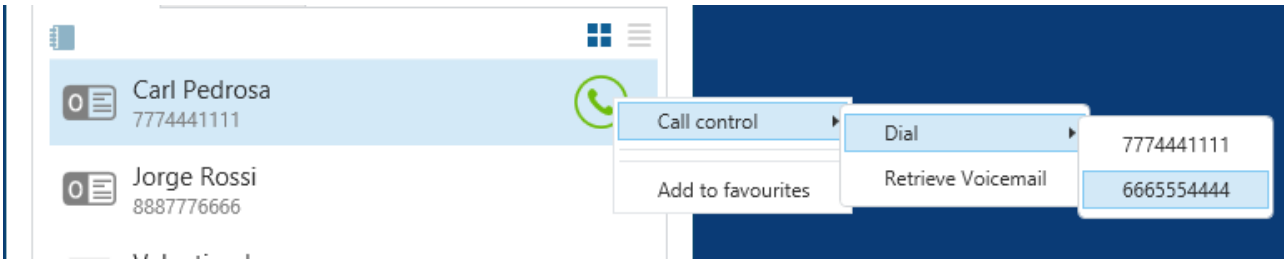
- Directory import for contacts
- Click to dial
- Meet-Me conference creation
- Screen pop for contacts
- Automatic journal entry
- Calendar & DND synchronisation
- Business Contact Manager for Outlook

Directory import for contacts

Users can enable their Outlook© personal contacts to be linked into Phone Manager. This enables the contact to be searched for using the *Home*, *Telephone* or *Mobile/Cell* numbers as well as the *first*, *middle*, *last* or *company name* fields directly from within Phone Manager. As there can be other types of contacts shown in the Phone Manager contacts window, Outlook© contacts are shown with a icon next to them.



Once found they can then be dialled using any of the numbers associated with the contact. Clicking on the dial icon will call the main number but any number can be selected by right clicking and selecting the relevant number to call.

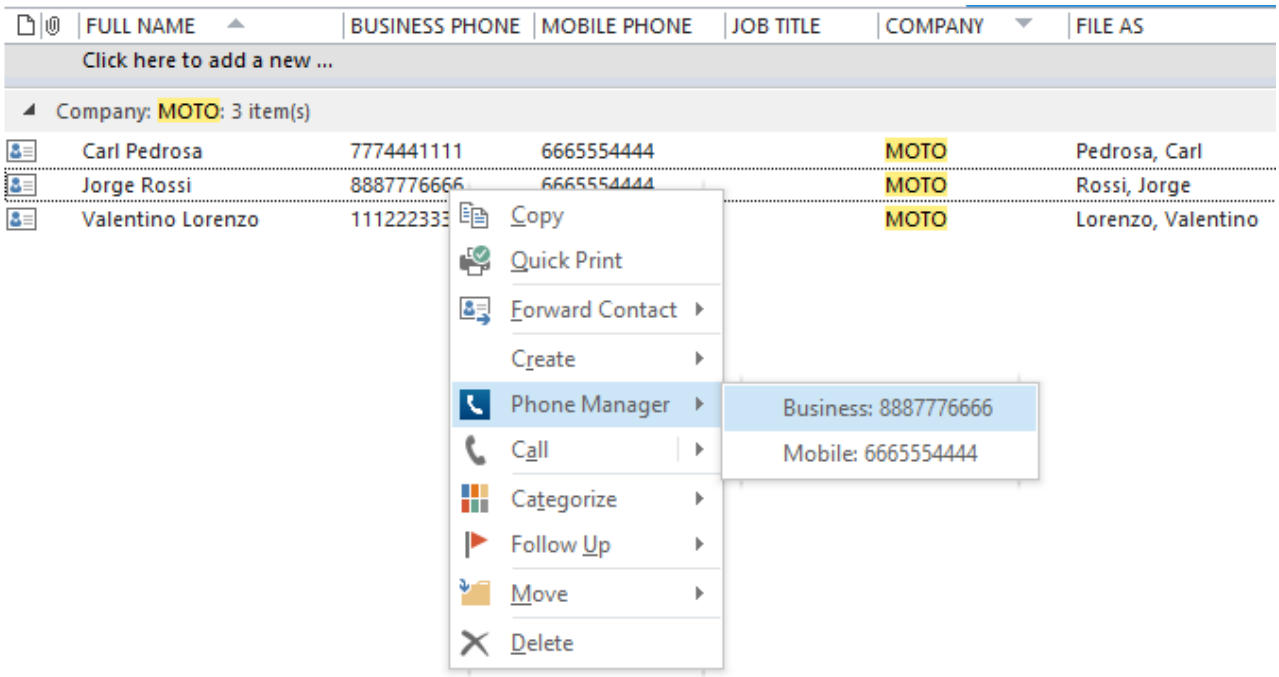


Frequently accessed contacts can be pinned to the Users favourites directory, by right clicking on the contact entry and selecting *Add to favourites*, so that they permanently appear on the contacts tab.

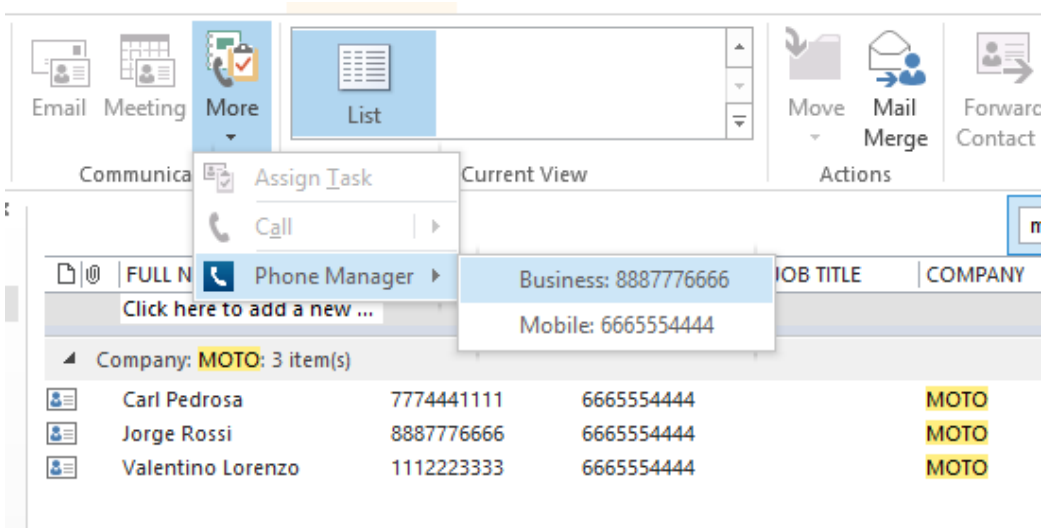
⚠ Only contacts in the users personal folder are available for directory searching and adding to favourites.

Click to dial

Calling a contact directly from Outlook© is supported when using the Phone Manager Outlook© Add-In. This is installed by default with each Phone Manager client and adds new entries to the contacts screen within Outlook©. When the contact list is open a User can right click on a contact and select the *Phone Manager* menu and then select the number to call.



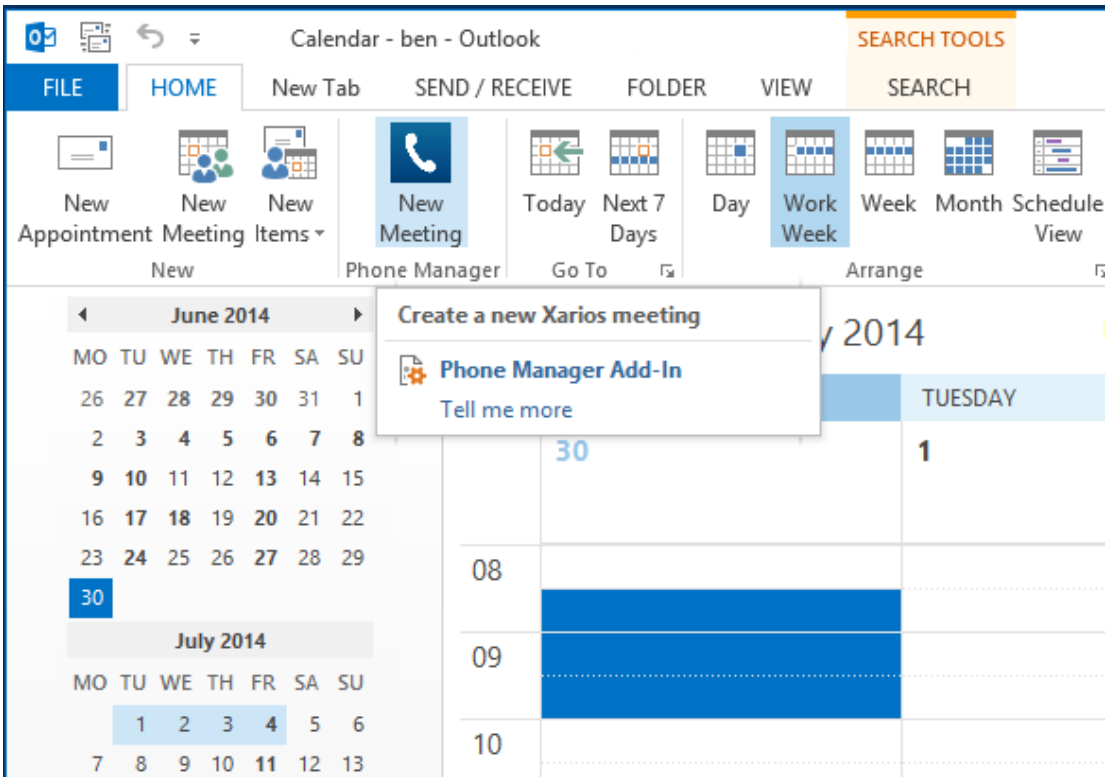
When in the contact list or contact details view at the top the ribbon bar can also be used. From the *Communicate* ribbon, select *More* and then *Phone Manager*.



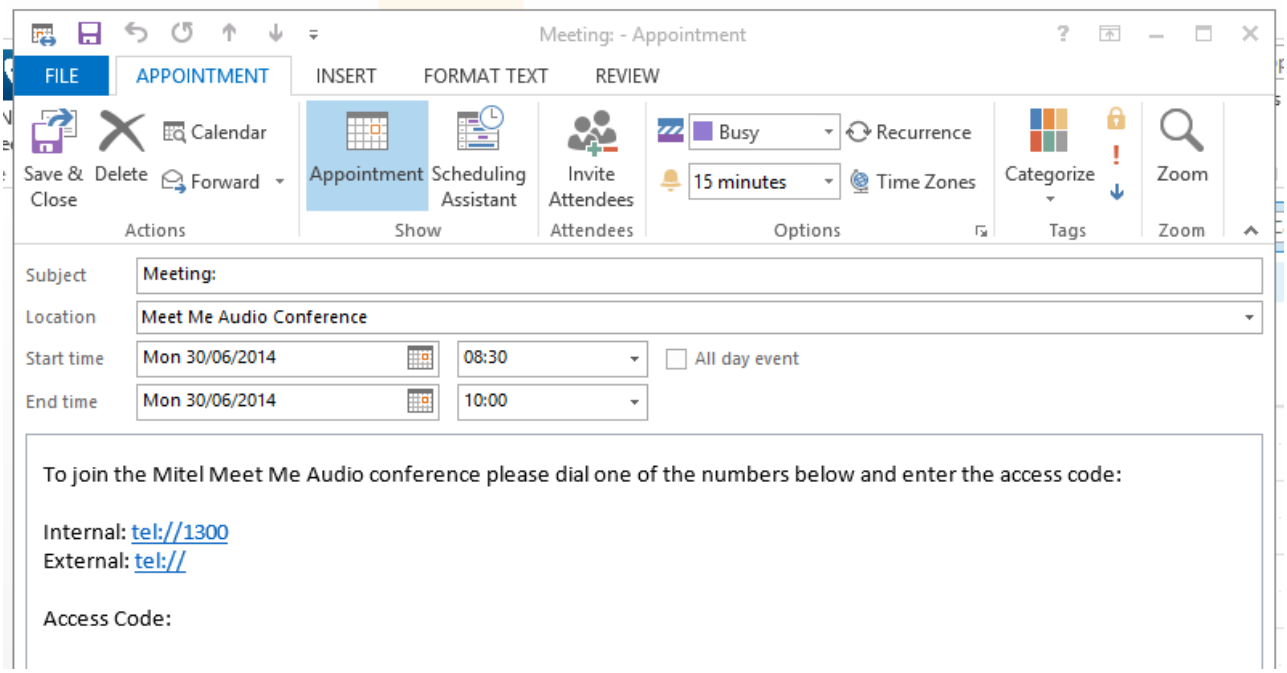
This requires Phone Manager to be running in the same Windows session as Outlook©.

Meet-Me conference creation

Creating a new Meet-Me conference appointment directly from Outlook© is supported when using the Phone Manager Outlook© Add-In. This is installed by default with each Phone Manager client and adds new entries to the calendar screen within Outlook©.

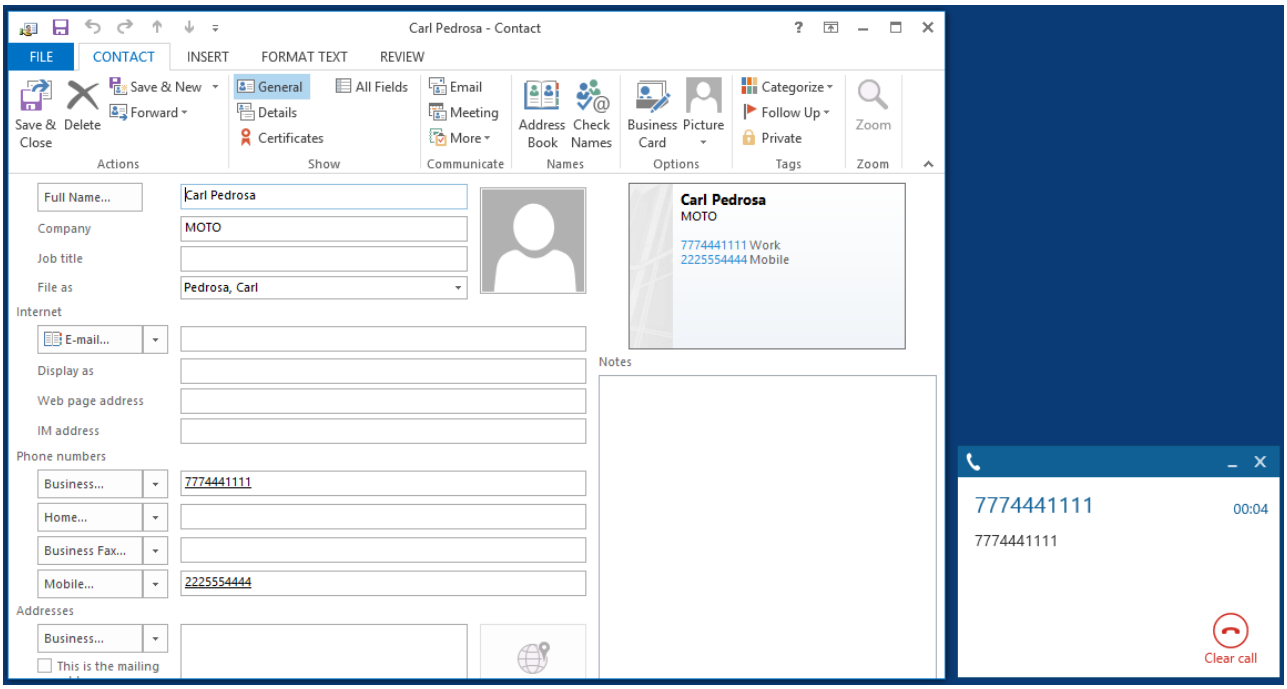


When selected, a new appointment is displayed that is pre populated with the telephone number and access code to dial into a Meet-Me conference.

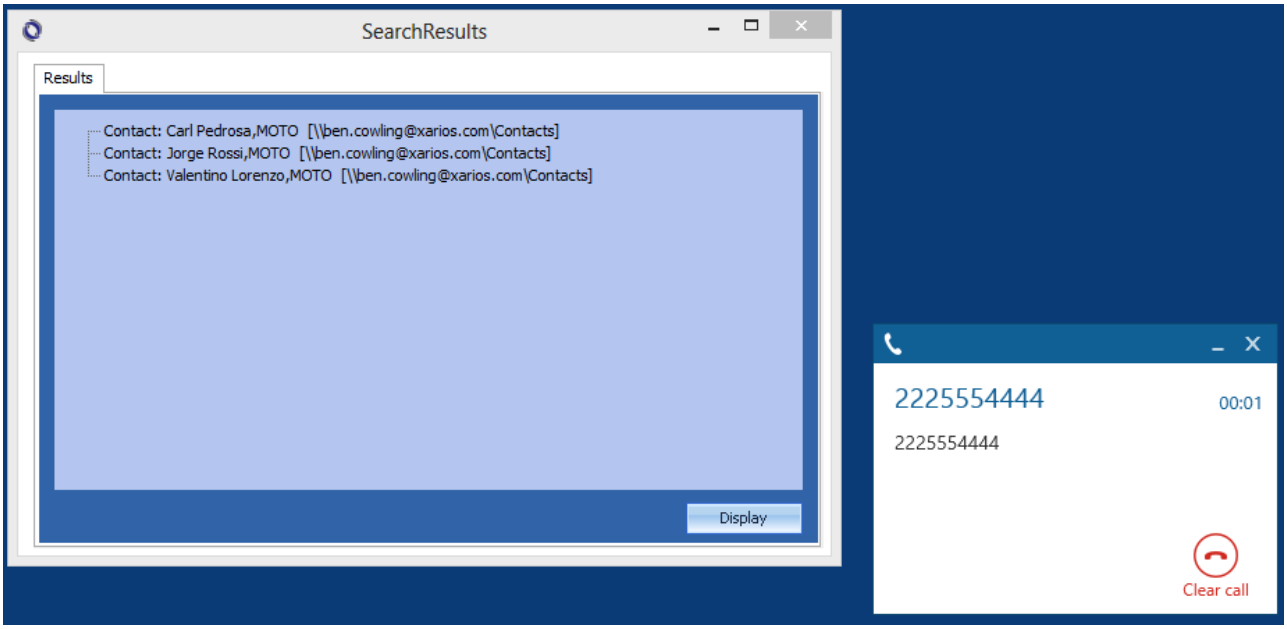


Screen pop for contacts

The Users local or public contacts can be screen popped directly within Outlook© when an incoming call is received using the caller id or from an outgoing call using the dialled number. The telephone number is then used to find any matching contacts that have this number. For example an inbound call is received from 7774441111 as shown on the toaster. The plugin has then performed a search on the Outlook© contacts to find any records that have matching telephone numbers. A match was found and the Outlook© contact records was automatically displayed.



If multiple matches are found then the *Search Results* window is shown and enables the User to select the correct contact to be displayed. For example a call is made to 222555444 and this has found three contacts that have this telephone number.



Double clicking on the relevant contact or highlighting and clicking on the *Display* button will show the required Outlook© contact.

Contact folders

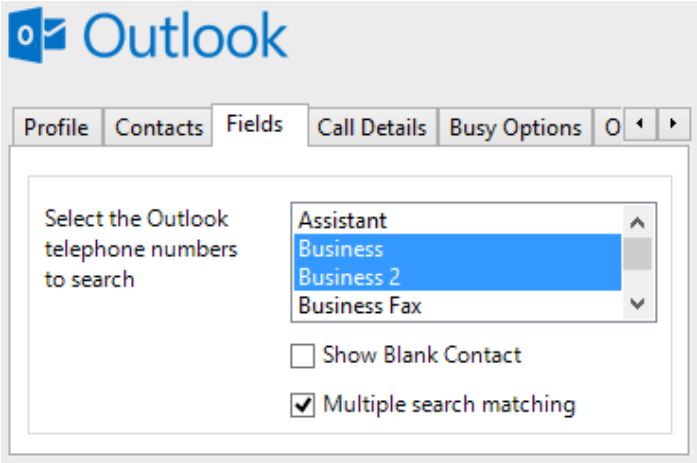
The Users local Outlook© contact folder is used when trying to find any matching contacts (**Default)**. Additional Outlook© Public folders can be added to the search from the *Contacts* tab in the configuration.

To enable public folders to be searched check the *Search Public Contact Folders* option and then click on the *Refresh* button. This will list all of the available public folders for this User and then the appropriate options can then be selected.

> ⚠ Using public folder searching may require additional time to perform the search and could delay any matches fron being found.

Contact fields

The telephone number fields that are to be searched can be configured for the contacts from the *Fields* tab in the configuration.



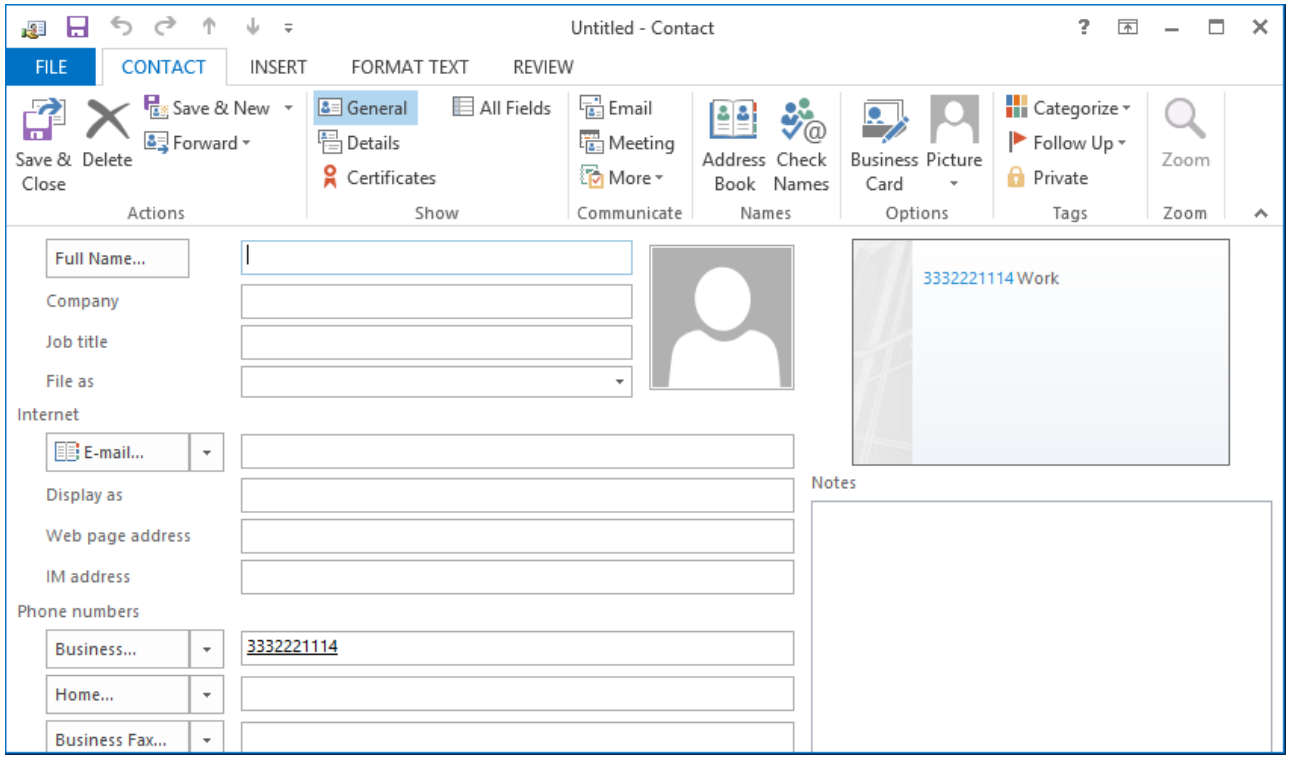
The list shows all of the available telephone number fields and if they are enabled for searched by default. These are the default field names and descriptions and may be different from the ones shown in Outlook©.

Outlook Description	Outlook Field Name	Enabled?
Assistant	AssistantTelephoneNumber	✗
Business	BusinessTelephoneNumber	✓
Business 2	Business2TelephoneNumber	✓
Business Fax	BusinessFaxNumber	✗
Callback	CallbackTelephoneNumber	✗
Car	CarTelephoneNumber	✗
Company	CompanyMainTelephoneNumber	✗
Home	HomeTelephoneNumber	✓
Home 2	Home2TelephoneNumber	✓
Home Fax	HomeFaxNumber	✗
ISDN	ISDNNumber	✗
Mobile	MobileTelephoneNumber	✓
Other Fax	OtherFaxNumber	✗
Pager	PagerNumber	✗
Primary	PrimaryTelephoneNumber	✗
Radio	RadioTelephoneNumber	✗
Telex	TelexNumber	✗

TTY/TDD	TTYTDDTelephoneNumber	

Unmatched Contacts

If no matches are found then a blank contact can be shown with the outside number pre populated into the *Business* telephone field. Check the *Show Blank Contact* option to enable this, or uncheck (**Default**) to not do anything when no match is found to a call.



Multiple search matching

When more than one contact is matched and the *Multiple search matching* option is checked (**Default**) the *Search Results* window is displayed to the User to allow them to select the relevant contact. If this option is not checked then the first match found will be used and any further searching will be stopped. This can be useful when using public folders to reduce the time taken to perform the search.

Telephone number formats

Outlook© does not provide a standard format for storing telephone numbers within the system by default. Depending on the region where the client is running then different formats will be used:

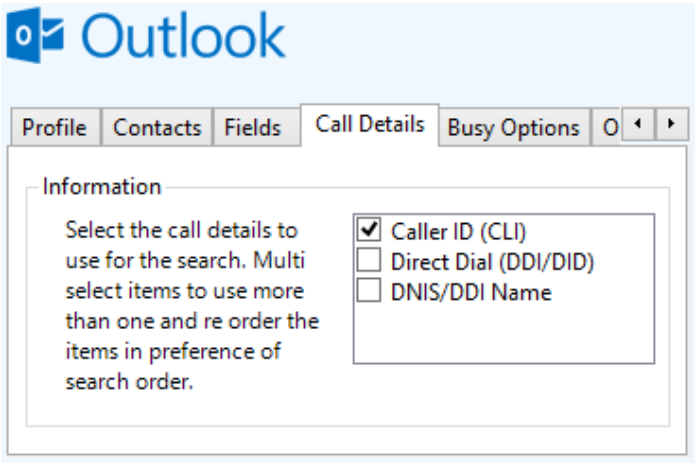
UK & International Telephone Formats			
08001831234	+44 (0123) 4567890	44 (08001)831234	+44 (080)0183 1234
08001 831234	08001-831234	(08001)831234	(08001)-831234
080 018 31234	080-018-31234	080 0183 1234	080-0183-1234
0800 1831234	0800-1831234	(0800)1831234	(0800)-1831234
(080)018-31234	0800 183 1234		

US Telephone Formats			
9876543210	19876543210	987-654-3210	1-987-654-3210
987.654.3210	1-987.654.3210	(987) 654-3210	1(987) 654-3210

+1 (987) 654-3210			

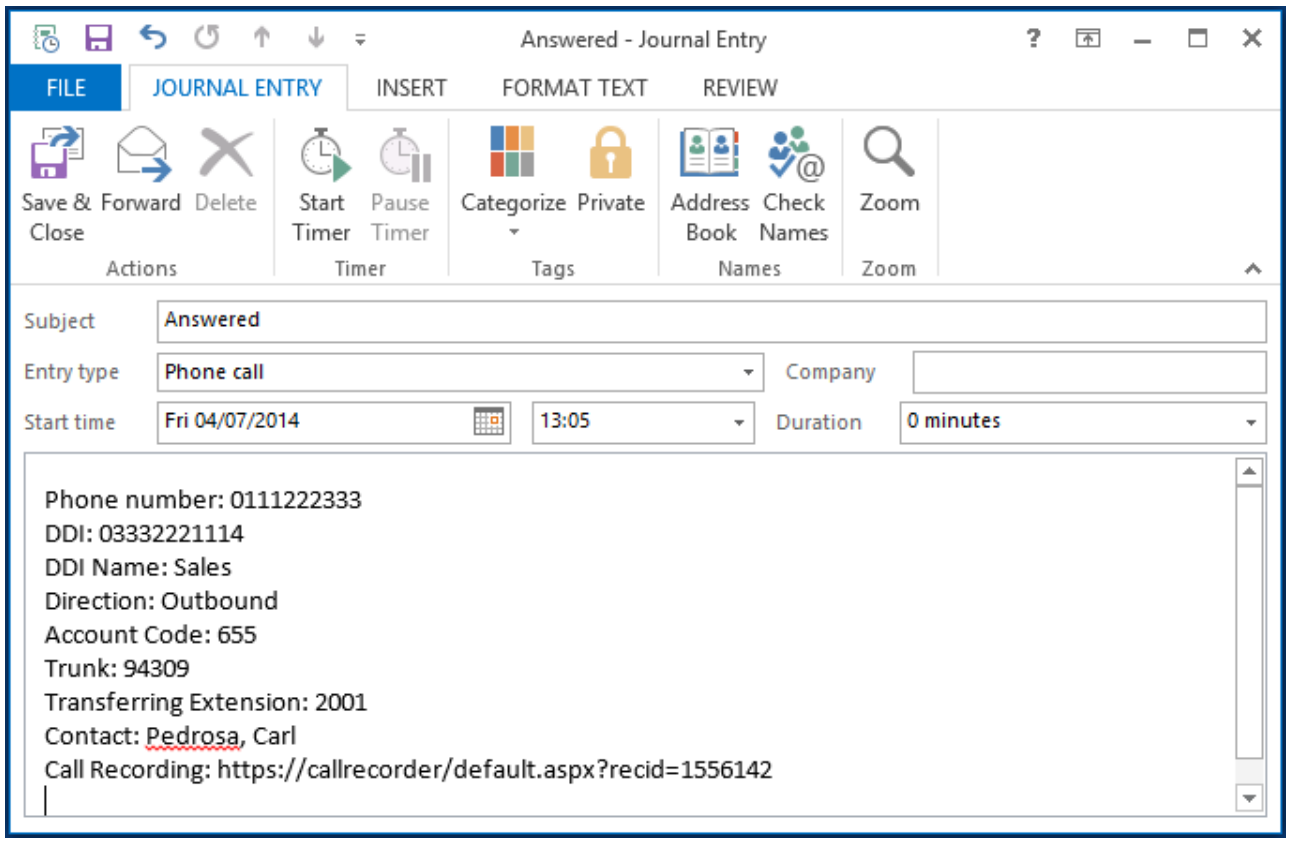
Call details

The call information that is used to search for matching records can be configured. By default the dialled number or the caller id are used to search depending on the call direction, but other call details can configured. There are options for the direct dial number (DDI/DID) or the direct dial name (DNIS).



Automatic journal entry

Phone Manager can work with the Journal within Outlook© and can have *Phone call* entries automatically created for calls made or received by the User when a match has been found to an entry in their Outlook© contacts. The contact to associate with this is found using the caller id received or dialled. If multiple matches are found then the *Search Results* window is shown as for the screen pop.



The body of the journal item is populated with the information below and the start and duration of the call.

Phone number	For inbound calls this is the caller ID and for outbound calls this is the dialled number.

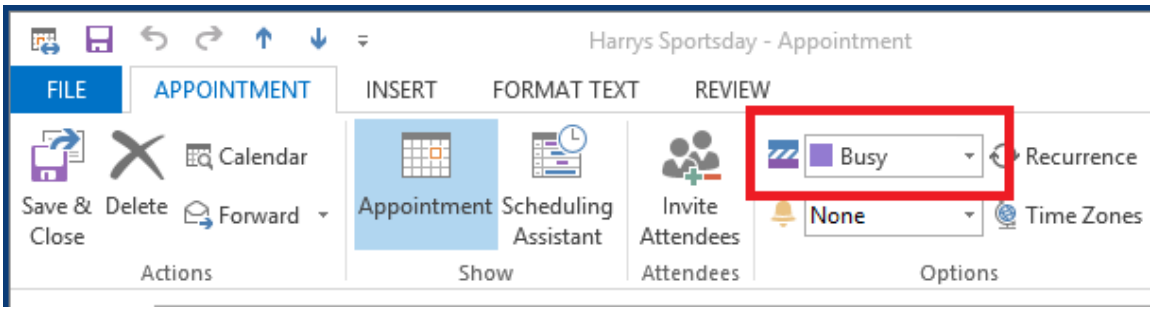
DDI/DID	For external inbound calls only, the DDI/DID number that the call came in on.
DDI/DID Name	For external inbound calls only, the DNIS of the DDI/DID that the call came in on.
Direction	The direction of the call.
Account Code	The account codes that was set on the call.
Trunk	For external calls the outside network trunk number that the call was made or receivec
Transferring Extension	The device that the call was transferred from.
Contact	The Outlook© contact name in the *last name, first name* format.
Duration	The duration of the call. The call event trigger must have been set to Call End as they not known until the call is cleared.
Call Recording	If integrating with a Xarios Call Recorder then this can contain a URL link to the call recording (this is not a clickable hyperlink but can be copied and pasted into a browser The call event trigger must have been set to at least Call Answered as the call recorde only create the recording id when the call has been answered.

Calendar & DND synchronisation

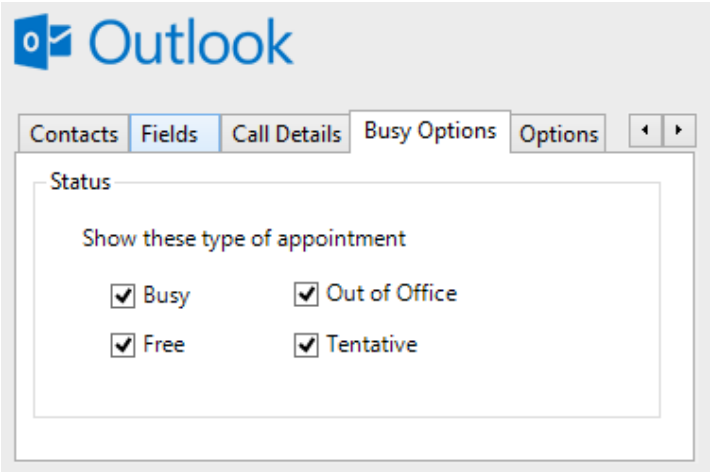
The calendar within Outlook© can be synchronised with the DND status of the endpoint of the User. For example when there is an appointment in the calendar and this is due the endpoint can be automatically placed into DND with the DND text set to the subject of the appointment. When the appointment ends, the endpoint will be automatically removed from DND.

Busy states

The busy status of the appointment can be used to filter what type of appointments will be used to automatically change the DND status.



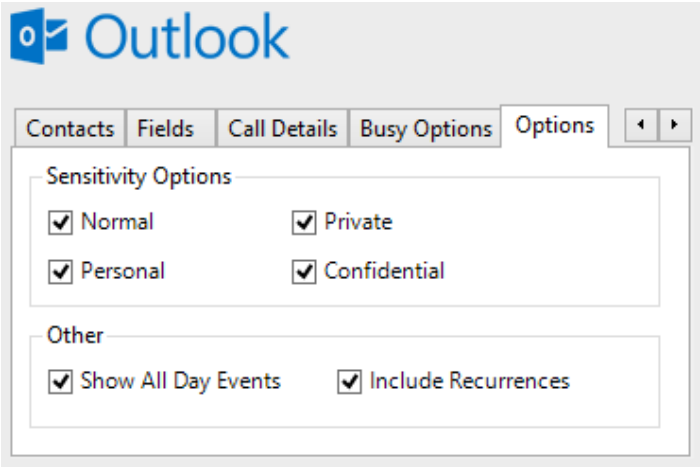
From the *Busy Options* tab check each entry to include this type of busy status.



Sensitivity options

The sensitivity type of the appointment can be used to filter what type of appointments will be used to automatically change the

DND status. From the *Options* tab check each of the *Sensitivity Options* to include this type.



Other options

There are other options that can be used to filter the type of appointments to include. Check the *Show All Day Events* include all day events. Check the *Include Recurrences* to include appointments that are recurring.

Business Contact Manager for Outlook

Phone Manager supports integration with contacts stored within Business Contact Manager for Outlook in the same way as for contacts that are stored within Public Folders.

⚠ Business Contact Manager contacts are not available for directory searching and adding to favourites.

5.5.3 Microsoft Dynamics CRM

Overview

This describes the features that are available when integrating with Microsoft Dynamics CRM.

Supported Versions

The following Microsoft Dynamics CRM versions are supported.

Version	On-premise deployment	Internet-facing deployment (IFD)	Microsoft Online
v5 (2011)	✓	✓	✓
v6 (2013)	✓	✓	✓

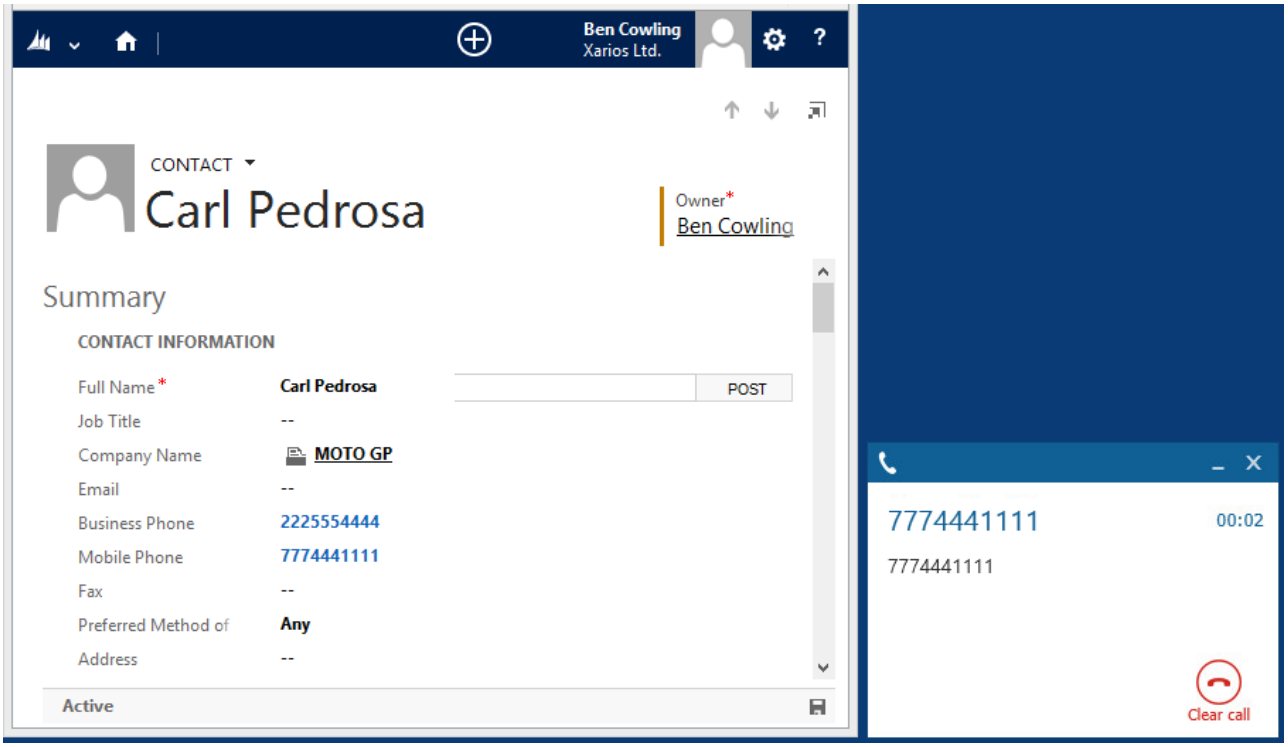
Features

Integration with Microsoft Dynamics CRM supports the features listed below:

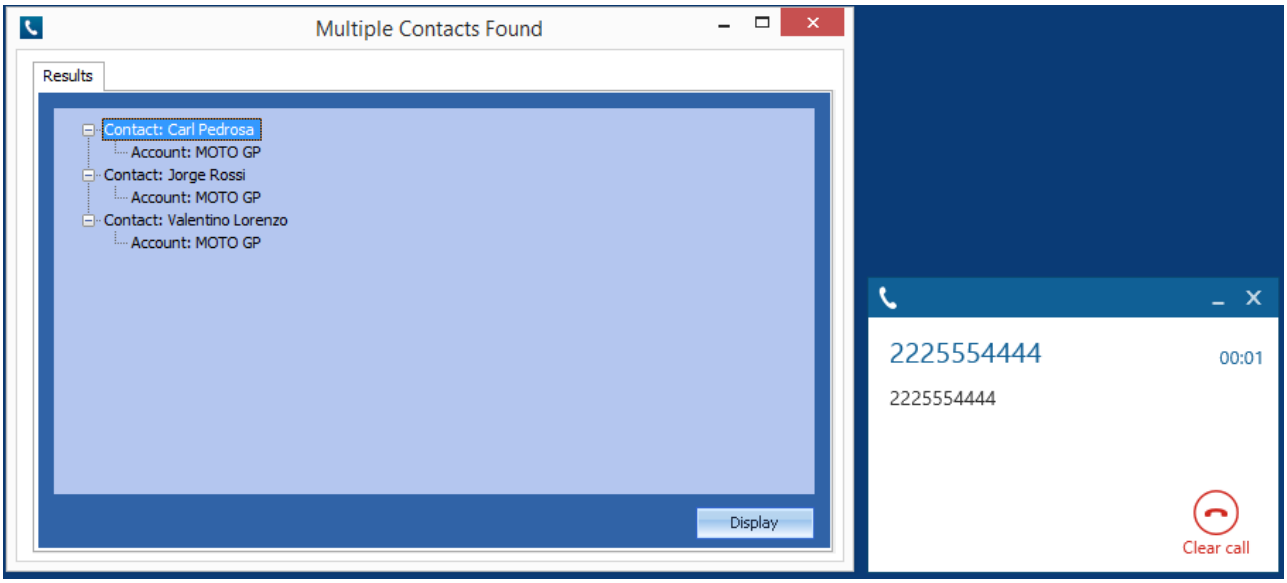
- Screen pop for contacts
- Automatic call history entry
- Calendar & DND synchronisation

Screen pop

CRM *Contact*, *Account* and/or *Lead* entities can be screen popped directly within CRM when an incoming call is received using the caller id or from an outgoing call using the dialled number. The telephone number is then used to find any matching entities that have this number. For example an inbound call is received from 7774441111 as shown on the toaster. The plugin performs a search to find any records that have matching telephone numbers. A matching *Contact* entity was found and the record was automatically displayed using the Users default browser.



If multiple matches are found then the *Multiple Contacts Found* is shown and enables the User to select the correct record to be displayed. For example a call is made to 222555444 and this has found three matching *Contact* entities that have this telephone number. This also will then show the any related entities, in this example the *Account* the contact is associated with.

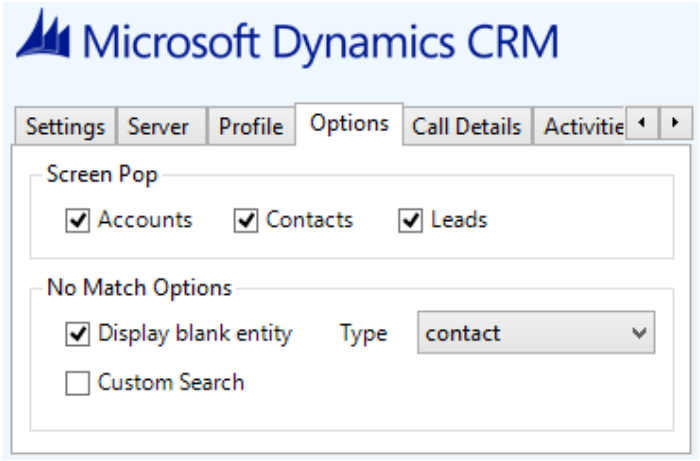


The correct Entity can then be highlighted and then clicking on the *Display* button will open this record.

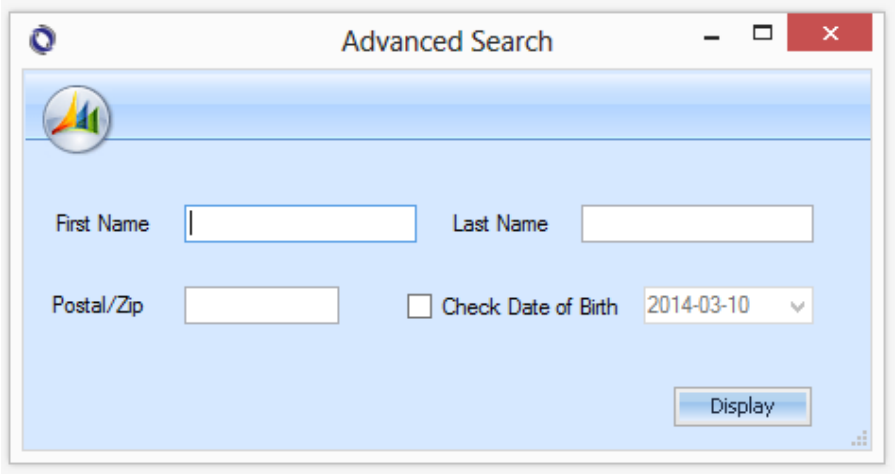
> The plugin will only search for *Accounts* and *Contacts* that are in the *Active* state. If any records have been *Deactivated* then they will not be displayed.

Entity and matching options

Configuration options are available on the plugin that allow the type of *Entities* to be used in the searching to be set. For example it can be configured so that only the *Contact* Entities are searched. These options are set on the *Options* tab



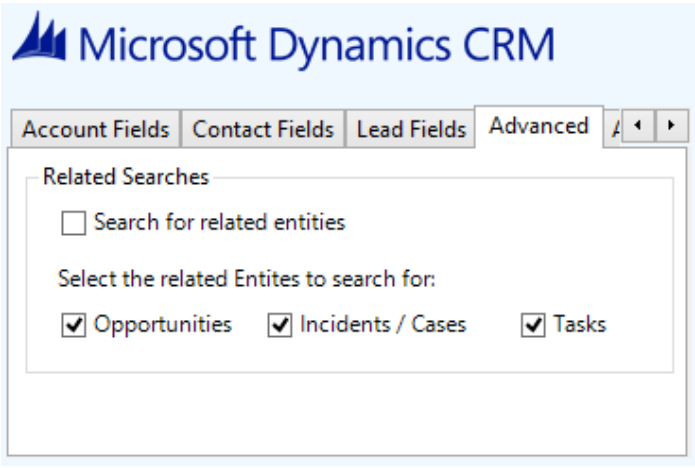
If no match is found then the *Custom Search* option can be selected and this will display a form to allow the user to enter the first name, last name, date of birth or post code and these values will then be used to try and find any matching records.



If still no match is found when searching for an Entity than a blank form can be automatically displayed to create a New Entity. The Type of Entity, *Contact*, *Account* or *Lead* that is created can be set here.

Advanced options

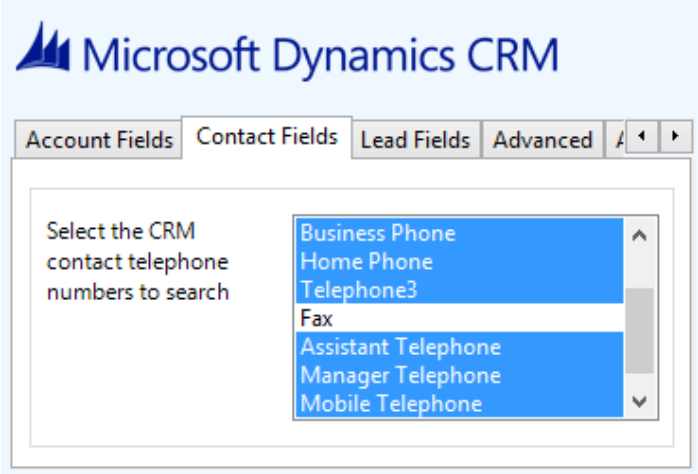
The *Advanced* tab allows control over if related Entities of a matching *Contact*, *Account* or *Lead* are shown in the *Multiple Contacts Found* window.



Any related Entities that have their *statecode* as *Open* (for Opportunities & Tasks) or *Active* (for Incidents/Cases) will then be displayed in the *Multiple Contacts Found* window. Selecting these related matches in the *Multiple Contacts Found* window and clicking *DIsplay* will then pop this record.

Search fields

The range of telephone numbers that are to be searched for can be configured for each of the *Contact*, *Account* or *Lead* Entities individually. By default the common telephone number fields are listed on the *Leads Fields*, *Contacts Fields* or *Account Fields* tab.



These are the default field name and descriptions and may be different if they have been customised. Contact your Microsoft Dynamics CRM administrator for details.

Contact Entities

Field name	Field description	Enabled?
Business Phone	telephone1	✓
Home Phone	telephone2	✓
Telephone3	telephone3	✓
Fax	fax	✓
Assistant Telephone	assistantphone	✓
Manager Telephone	managerphone	✓
Mobile Telephone	mobilephone	✓
Pager	pager	✓
Primary Address Phone 1	address1_telephone1	✓
Primary Address Phone 2	address1_telephone2	✓
Primary Address Phone 3	address1_telephone3	✓

Account Entities

Field name	Field description	Enabled?
Main Phone	telephone1	✓
Other Phone	telephone2	✓
Fax	fax	✓

Lead Entities

Field name	Field description	Enabled?
Business Phone	telephone1	✓

Home Phone	telephone2	✓
Other Phone	telephone3	✓
Fax	fax	✓
Mobile Phone	mobilephone	✓
Pager	pager	✓

Telephone number formats

Microsoft Dynamics CRM does not provide a standard format for storing telephone numbers within the system by default. The plugin supports searching for multiple different formats dependent on the region (UK or US) where the client is running. The default formats for the UK and International are shown below. This is based on the number 08001831234 been searched for.

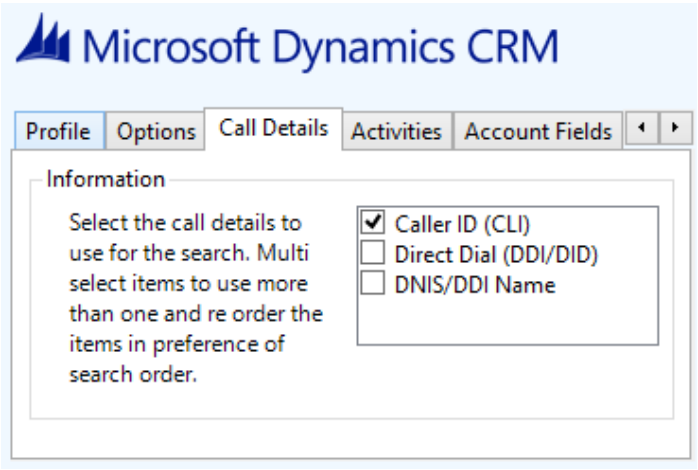
UK & International Telephone Formats			
08001831234	(0123) 4567890	44 (08001)831234	+44 (080)0183 1234
08001 831234	08001-831234	(08001)831234	(08001)-831234
080 018 31234	080-018-31234	080 0183 1234	080-0183-1234

The default formats for the US are shown below. This is based on the number 9876543210 been searched for.

US Telephone Formats			
9876543210	987.654.3210	+1 (987) 654-3210	19876543210
987-654-3210	(987) 654-3210	1-987.654.3210	1-987-654-3210
1(987) 654-3210			

Call details

The call information that is used to search for matching records can be configured. By default the dialled number or the caller id are used to search with, depending on the call direction, but other call details can configured. There are options for the direct dial number or the direct dial name (or DNIS) as shown.


Microsoft Dynamics CRM
Profile
Options
Call Details
Activities
Account Fields
Information
Select the call details to use for the search. Multi select items to use more than one and re order the items in preference of search order.
Caller ID (CLI)
Direct Dial (DDI/DID)
DNIS/DDI Name

Caller ID represents either the caller ID for inbound calls or the dialled number for outbound calls.

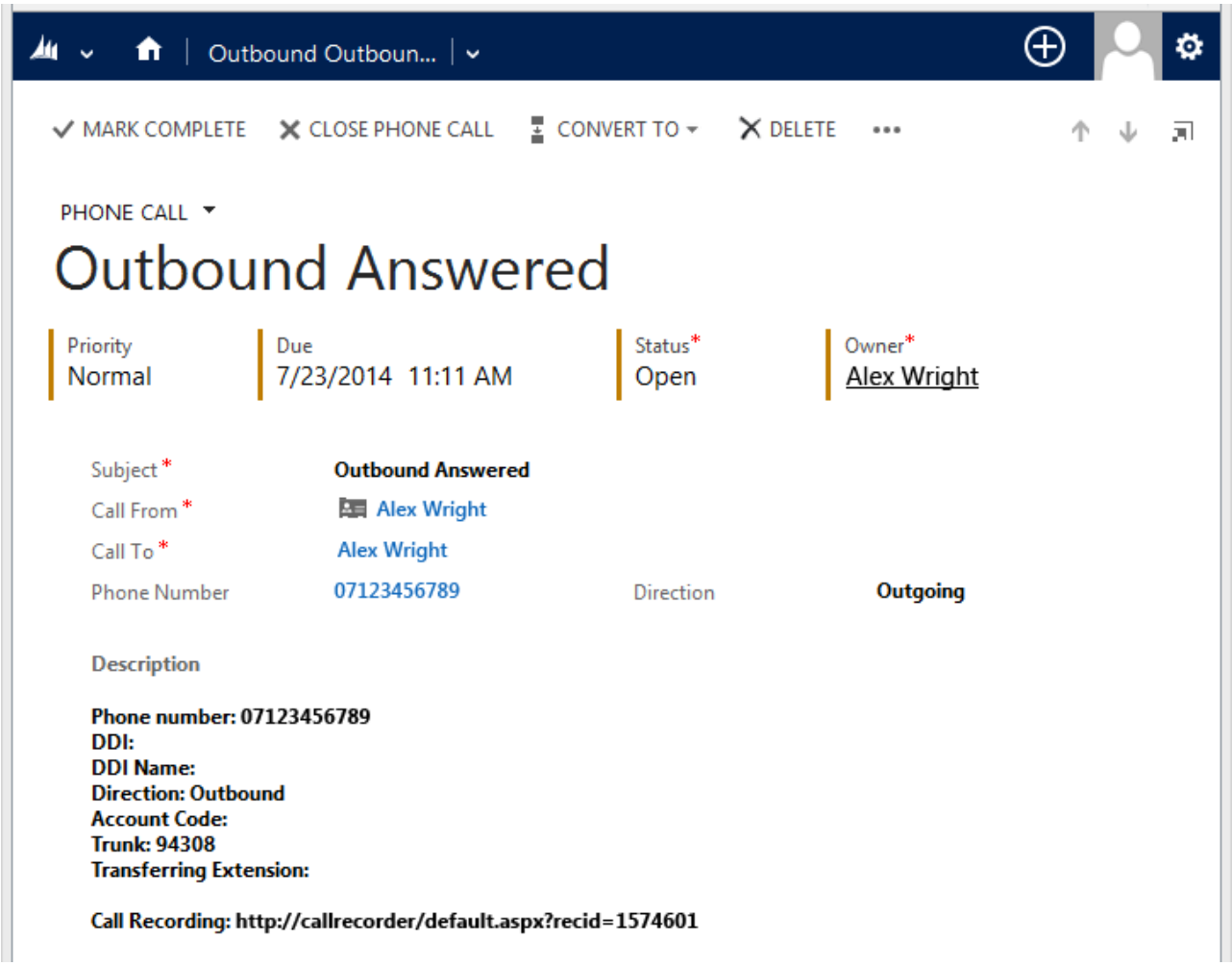
The configuration box lets you select multiple different types of call detail with the details to be used having the check box next to each one selected. The order of the searching can also be configured by dragging and dropping the entry and ordering the list accordingly.

When multiple call details are used the searching will stop as soon as a match is found with the first call detail.

Automatic call history entry

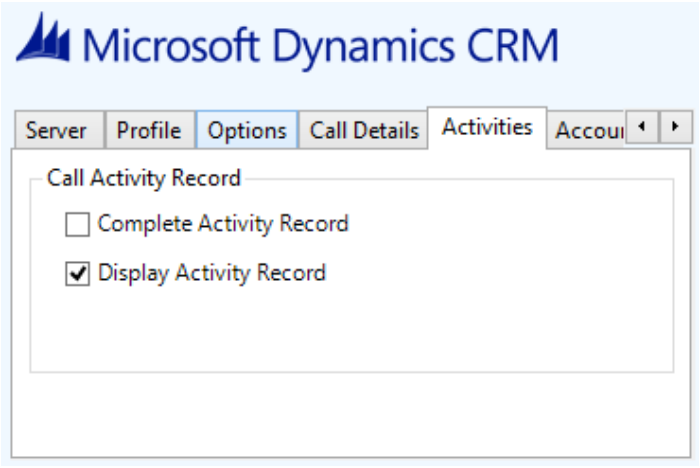
The plugin supports the ability to be able to automatically create and display a Microsoft Dynamics CRM Phone Call Activity entity. The Entity to associate this with is found using the caller id received or the number dialled, and if multiple matches are found then the *Multiple Contacts Found* window is shown as for the screen popping. The telephone numbers used to search are set in the screen popping section.

The Activity record is automatically created with the information relating to the call entered into the description field and the related entities are linked as shown.



Phone number	For inbound calls this is the caller ID and for outbound calls this is the dialled number.
DDI/DID	For external inbound calls only, the DDI/DID number that the call came in on.
DDI/DID Name	For external inbound calls only, the DNIS of the DDI/DID that the call came in on.
Direction	The direction of the call.
Account Code	The account codes that was set on the call.
Trunk	For external calls the outside network trunk number that the call was made or receivec
Transferring Extension	The device that the call was transferred from.
Duration	The duration of the call. The call event trigger must have been set to Call End as they not known until the call is cleared.
Call Recording	If integrating with a Xarios Call Recorder then this can contain a URL link to the call recording (this is not a clickable hyperlink but can be copied and pasted into a browser The call event trigger must have been set to at least Call Answered as the call recorde only create the recording id when the call has been answered.

The plugin configuration has several options that can be set to determine how the record is created.



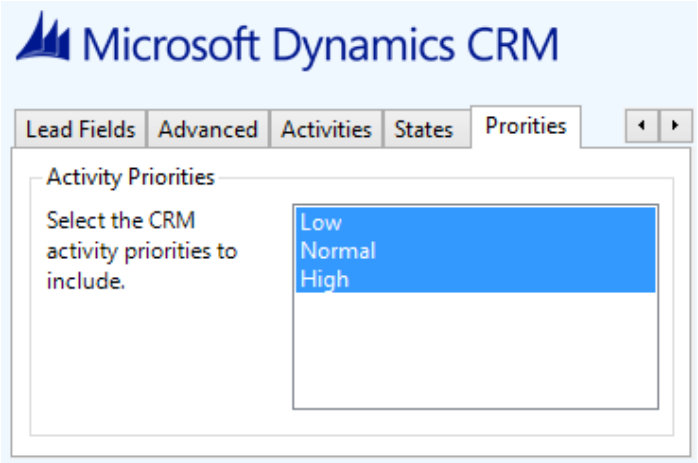
Complete Activity Record: This will set the status of the Activity to be Completed.

Display Activity Record: This will display the Activity form, if this is not set then the record will be created without the user seeing the form.

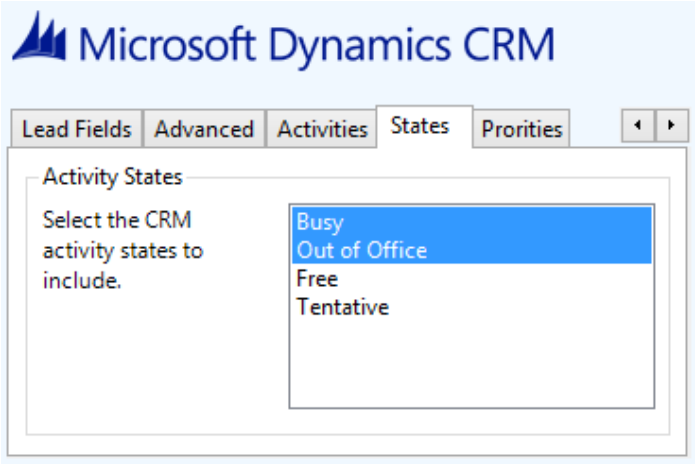
Calendar & DND synchronisation

The calendar within Microsoft Dynamics CRM can be synchronised with the DND status of the endpoint of the User. For example when there is an appointment in the calendar and this is due to start the endpoint can be automatically placed into DND with the DND text set to the *Subject* field of the appointment. When the appointment ends, the endpoint will be automatically removed from DND.

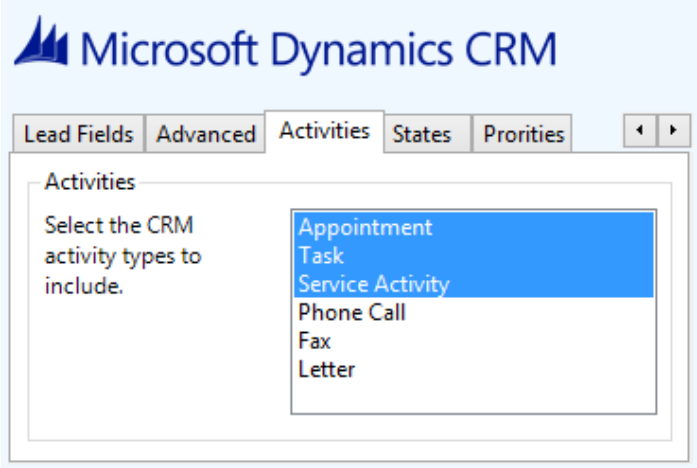
There are several options to be able to control the types of Activities that cause the endpoint to go into DND. The *Priorities* tab allows Activities with a specific priority to be included or excluded.



The States tab allows only Activities with specific states to be included or excluded.



The Activities tab allows specific types of Activities to be included or excluded.

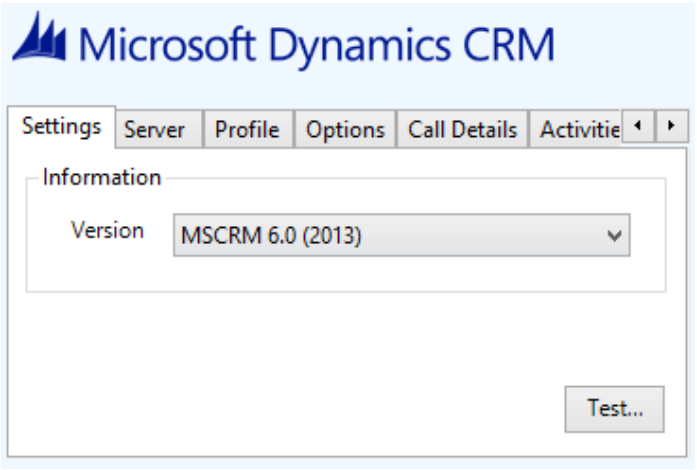


Configuration

For any of the features there needs to be some basic configuration that needs to be performed to authenticate and allow access to Dynamics CRM.

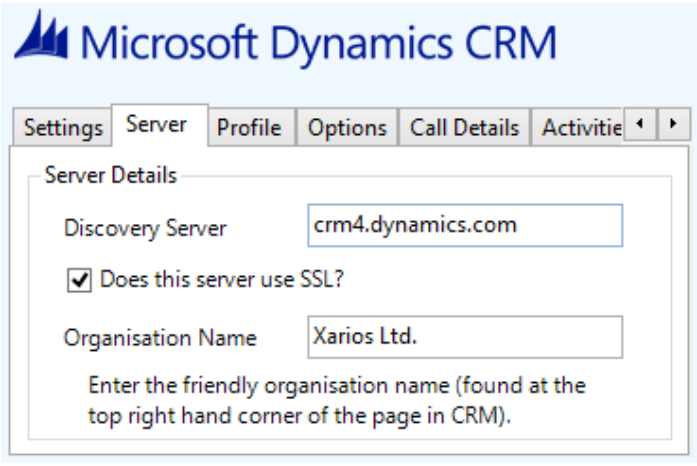
Settings and versions

The correct version of Dynamics CRM that is used needs to be selected from the Version drop down on the *Settings* tab.



Server connection

The specific connection details to the CRM server need to be set on the *Server* tab.



Discovery Server: This is the URL of the Microsoft Dynamics CRM discovery server. This is normally the same as the CRM

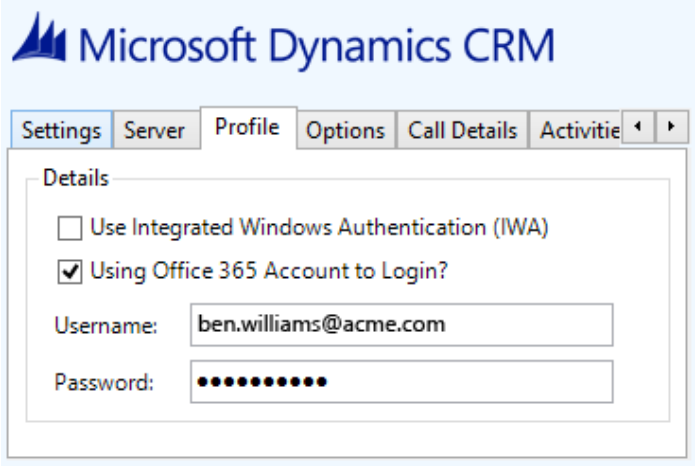
server. Contact your administrator for details on what this should be. Leave this as crm4.dynamics.com for the Microsoft hosted version.

Does this server use SSL: If SSL/HTTPS connection is required to connect to the CRM system enable this option.

Organisation Name: This should be set to the organisation name configured for the company that will be used to integrate with. This should match the exact name shown in the top right hand corner of the CRM web page when you are logged in.

Authentication and profile details

The Profile tab enables the security credentials used to access Microsoft Dynamics CRM to be configured.



Use Integrated Windows Authentication: If this is set then the username, password and domain details from user who is logged on the computer will be used.

> ⚠ Using Integrated Windows Authentication is NOT supported when using IFD and claims based authentication.

Depending on the configuration of Microsoft Dynamics CRM and how it is accessed will determine what options are required.

5.5.4 Microsoft Dynamics NAV

Overview

This describes the features that are available when integrating with Microsoft Dynamics NAV.

Supported Versions

The following Microsoft Dynamics NAV versions are supported.

Version	Client	Supported
v4.0 SP2	Classic Client	
v5.00	Classic Client	
v6.00 (2009)	Classic Client	
v6.00 (2009 R2)	RoleTailored Client	
v7.00 (2013)	Web Client	
v7.00 (2013 R2)	RoleTailored Client	

Features

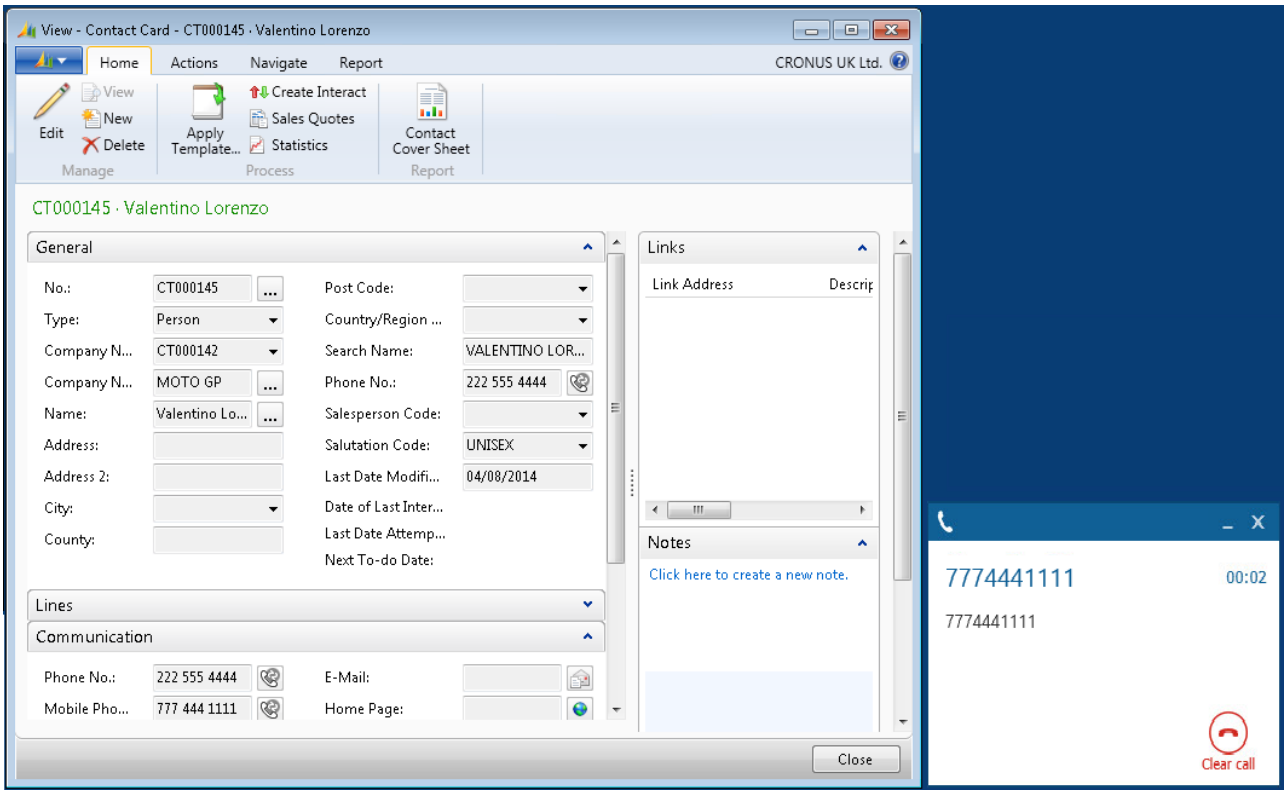
Integration with Microsoft Dynamics NAV supports the features listed below:

- Screen pop

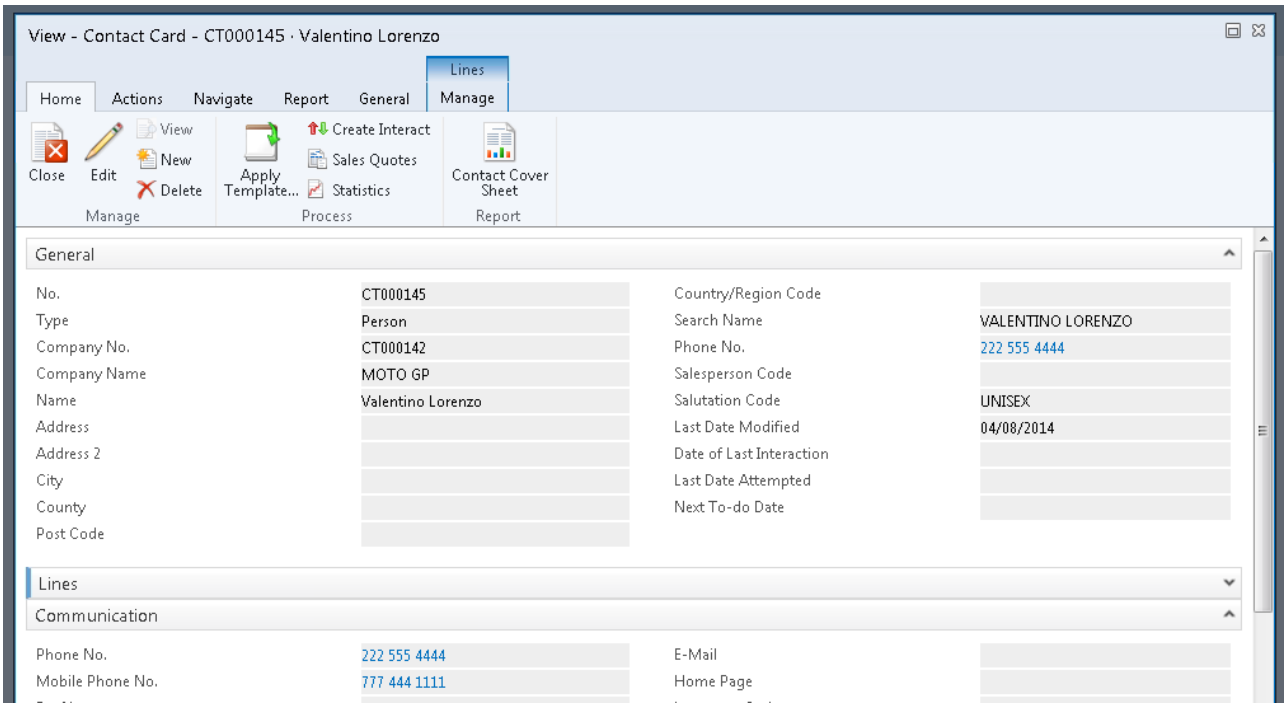
Screen pop

Microsoft Dynamics NAV *Contact* or *Customer* cards can be screen popped directly within NAV when an incoming call is received using the caller id or from an outgoing call using the dialled number. The telephone number is then used to find any matching entities that have this number. For example an inbound call is received from 7774441111 as shown on the toaster. The plugin performs a search to find any records that have matching telephone numbers. A matching *Contact* was found and the card was automatically displayed within the NAV client.

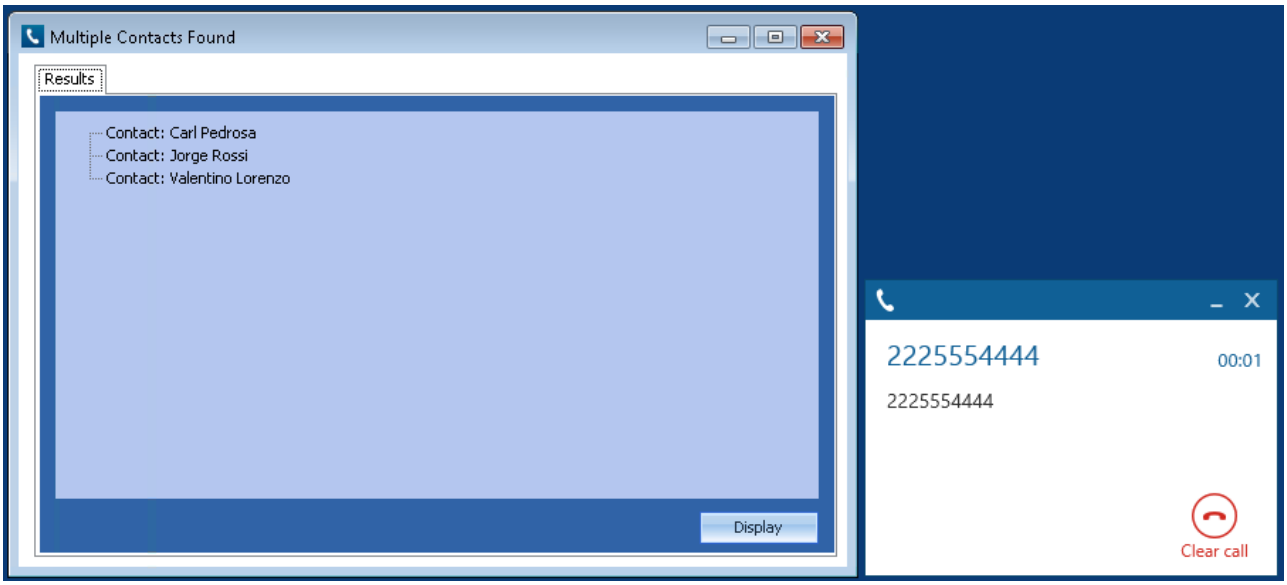
This example shows the RoleTailored Client.



This example shows the Microsoft Dynamics NAV web client, the matching contact is shown using the Users default browser settings.



If multiple matches are found then the *Multiple Contacts Found* is shown and enables the User to select the correct card to be displayed. For example a call is made to 222555444 and this has found three matching *Contacts* that have this telephone number.

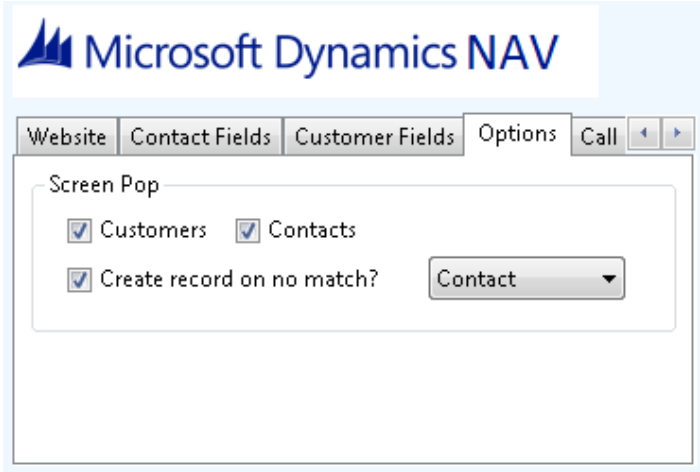


The correct entry can then be highlighted and then clicking on the *Display* button will open this card.

Entity and matching options

Configuration options are available on the plugin that allow the type of *cards* to be used in the searching to be set. For example it can be configured so that only the *Customer* or *Contact* Entities are searched. These options are set on the *Options* tab.

Selecting the *Create record on no match?* will create and open and new card of the type that has been selected.



If no match is found then no records will be displayed.

Search fields

The range of telephone numbers that are to be searched for can be configured for each of the *Contact* or *Customer* cards individually. By default the common telephone number fields are listed on the *Contact Fields* and *Customer Fields* tab.

These are the default field names and may be different if they have been customised. Contact your Microsoft Dynamics NAV administrator for details.

Contacts

Field Description	Field name	Enabled?
Phone Number	Phone No_	✓
Mobile Phone Number	Mobile Phone No_	✓
Fax Number	Fax No_	✓

Telex Number	Telex No_	✓
Pager Number	Pager	✓

Customers

Field Description	Field name	Enabled?
Phone Number	Phone No_	✓

Telephone number formats

Microsoft Dynamics NAV does not provide a standard format for storing telephone numbers within the system by default. The plugin supports searching for multiple different formats dependent on the region (UK or US) where the client is running. The default formats for the UK and International are shown below. This is based on the number 08001831234 been searched for.

UK & International Telephone Formats			
08001831234	(0123) 4567890	44 (08001)831234	+44 (080)0183 1234
08001 831234	08001-831234	(08001)831234	(08001)-831234
080 018 31234	080-018-31234	080 0183 1234	080-0183-1234

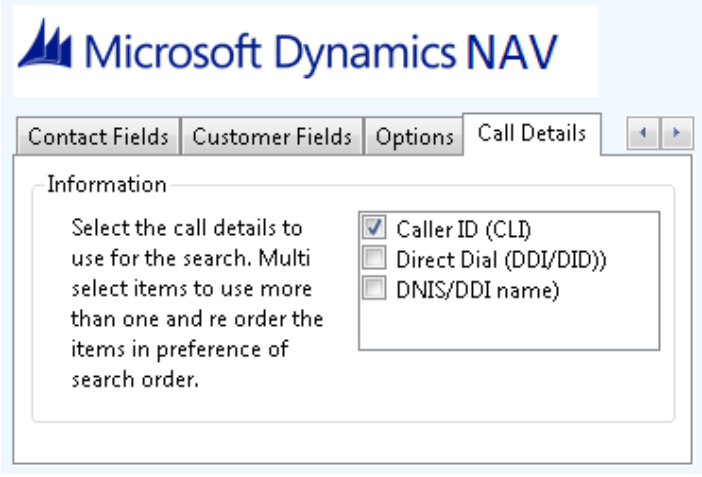
The default formats for the US are shown below. This is based on the number 9876543210 been searched for.

US Telephone Formats			
9876543210	987.654.3210	+1 (987) 654-3210	19876543210
987-654-3210	(987) 654-3210	1-987.654.3210	1-987-654-3210
1(987) 654-3210			

Microsoft Dynamics NAV stores the country code and area code parts of each telephone number separately from the main number. From the *Formats* tab the country and area codes can be set to be appended to the telephone number when a search is made.

Call details

The call information that is used to search for matching records can be configured. By default the dialled number or the caller id are used to search with, depending on the call direction, but other call details can configured. There are options for the direct dial number or the direct dial name (or DNIS) as shown.


Microsoft Dynamics NAV
Contact Fields
Customer Fields
Options
Call Details
Information
Select the call details to use for the search. Multi select items to use more than one and re order the items in preference of search order.
Caller ID (CLI)
Direct Dial (DDI/DID))
DNIS/DDI name)

Caller ID represents either the caller ID for inbound calls or the dialled number for outbound calls.

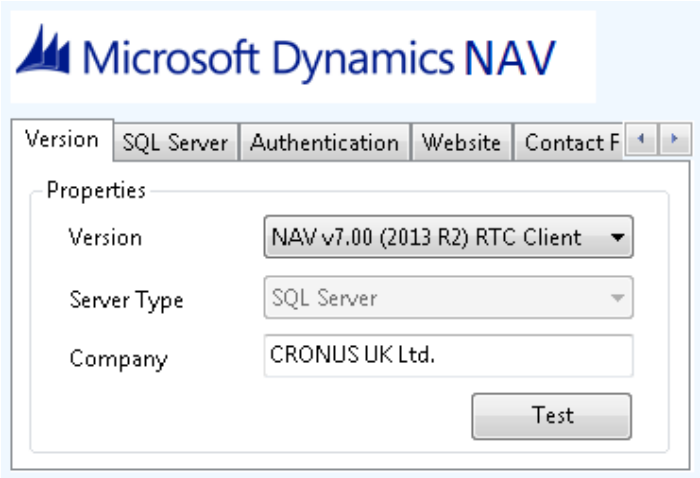
The configuration box lets you select multiple different types of call detail with the details to be used having the check box next to each one selected. The order of the searching can also be configured by dragging and dropping the entry and ordering the list accordingly.

When multiple call details are used the searching will stop as soon as a match is found with the first call detail.

This field name must be the same with both *Contacts* and *Customers*.

Configuration

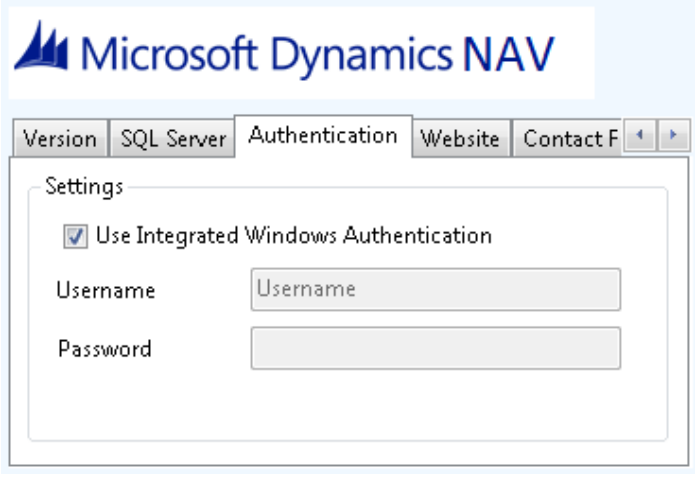
The integration needs to be configured for the correct version of Microsoft Dynamics NAV that is running.



From the *Version* tab select the relevant entry from the drop down list. Then select the correct *Server Type* for the type of NAV server that will be used, this can either be *SQL Server* or *Navision* and depends the on the version of the NAV selected.

Authentication

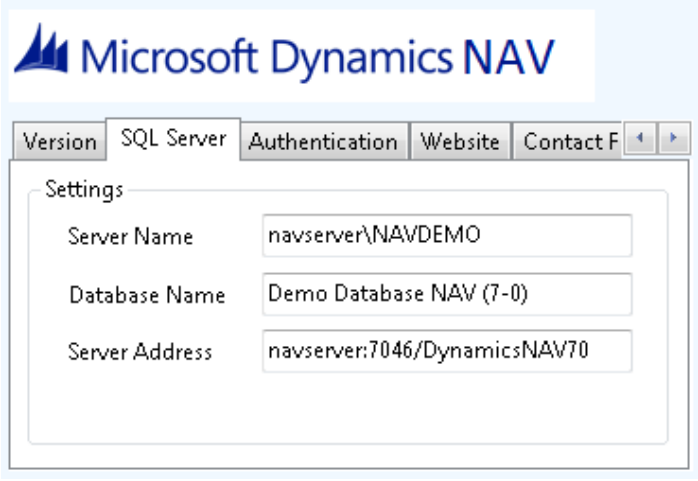
The *Authentication* tab enables the security credentials used to access Microsoft Dynamics NAV to be configured. Select the *Use Integrated Windows Authentication* option if the username, password and domain details from user who is logged on the computer will be used.



Depending on the configuration of Microsoft Dynamics NAV and how it is accessed will determine what options are required. For example if a different user account is used to access NAV than what is currently logged into the computer then they will need to be manually entered.

SQL Server connection

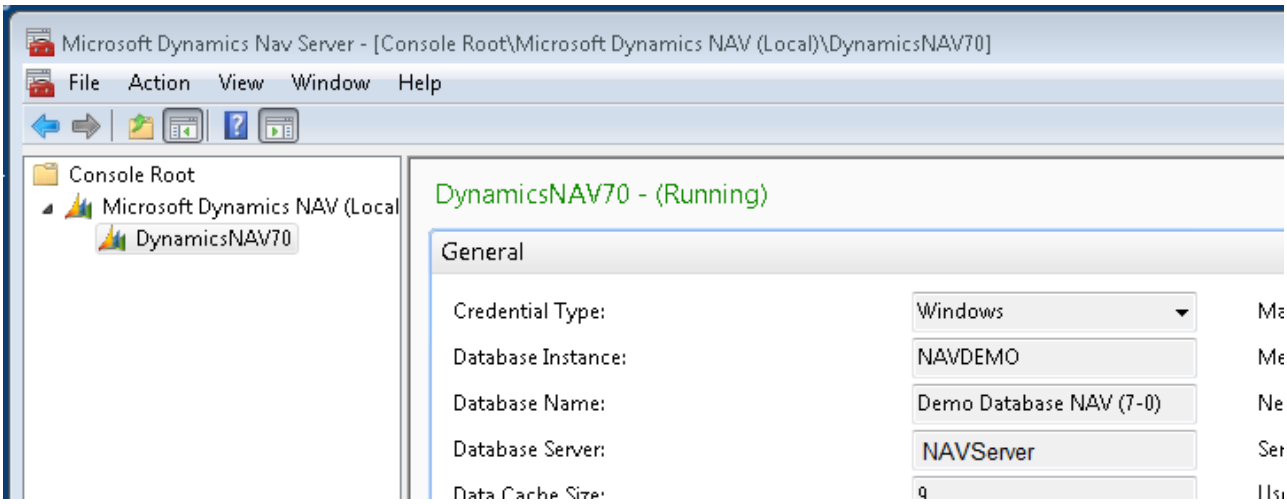
If the *Server Type* has been configured as *SQL Server* then the connection details for the SQL Server needs to be entered.



The *Server Name* is the hostname of the SQL Server database, this should also contain any instance names if been used, for example:

- navserver\NAVDEMO

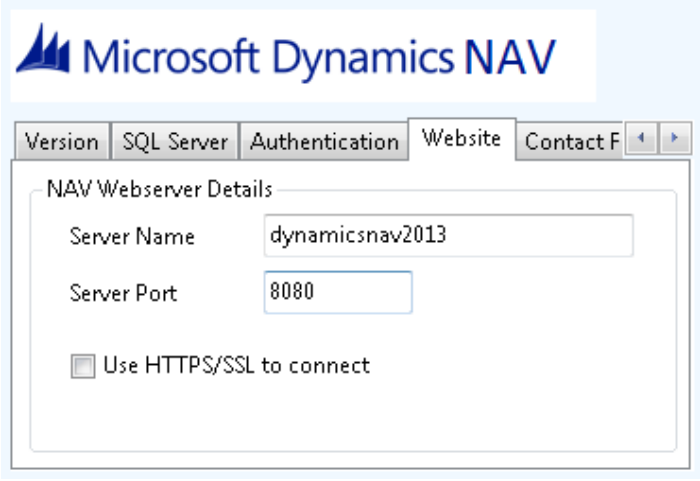
This will connect to the *NAVDEMO* database instance on the server with the hostname of *navserver*. This correct value for this can be found using the *Microsoft Dynamics NAV Administration* tool.



The *Database Name* option is the name of the SQL Server database to connect to and can alos be found using the *Microsoft Dynamics NAV Administration* tool.

Web server

The *Website* tab enables the web server details to be configured for the Microsoft Dynamics NAV Web client connection.



Enter the *Server Name* of the Microsoft Dynamics NAV webserver and the *Server Port* to connect with, the default is 8080. If the connection to the web server is using a secure HTTP connection then check the *User HTTPS/SSL to connect* option.

5.5.5 Sage CRM

Overview

This describes the features that are available when integrating with Sage CRM.

Supported Versions

The following Sage CRM versions are supported.

Version	Supported
v5.7 - v7.0	
v7.1	
v7.2	

Editions	Supported
Sage CRM Professional Edition (Cloud)	
Sage CRM On-Premise Edition	
Sage CRM Essentials Edition (Cloud)	

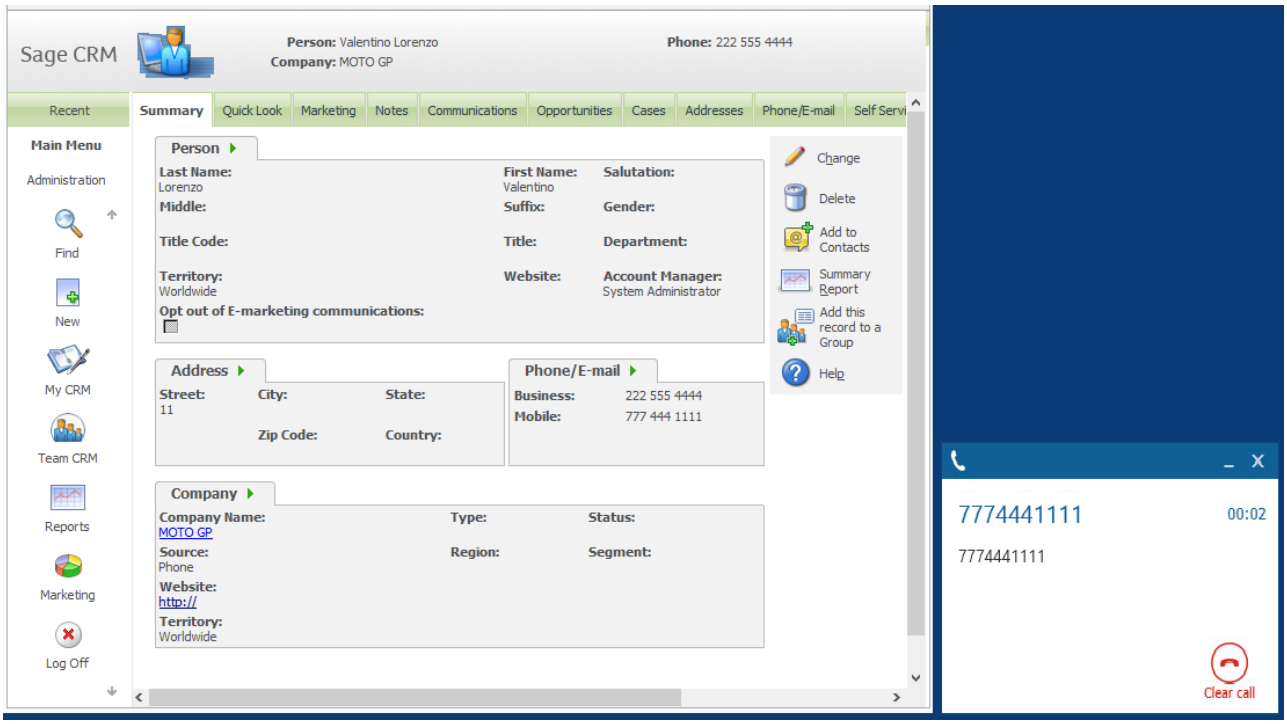
Features

Integration with Sage CRM supports the features listed below:

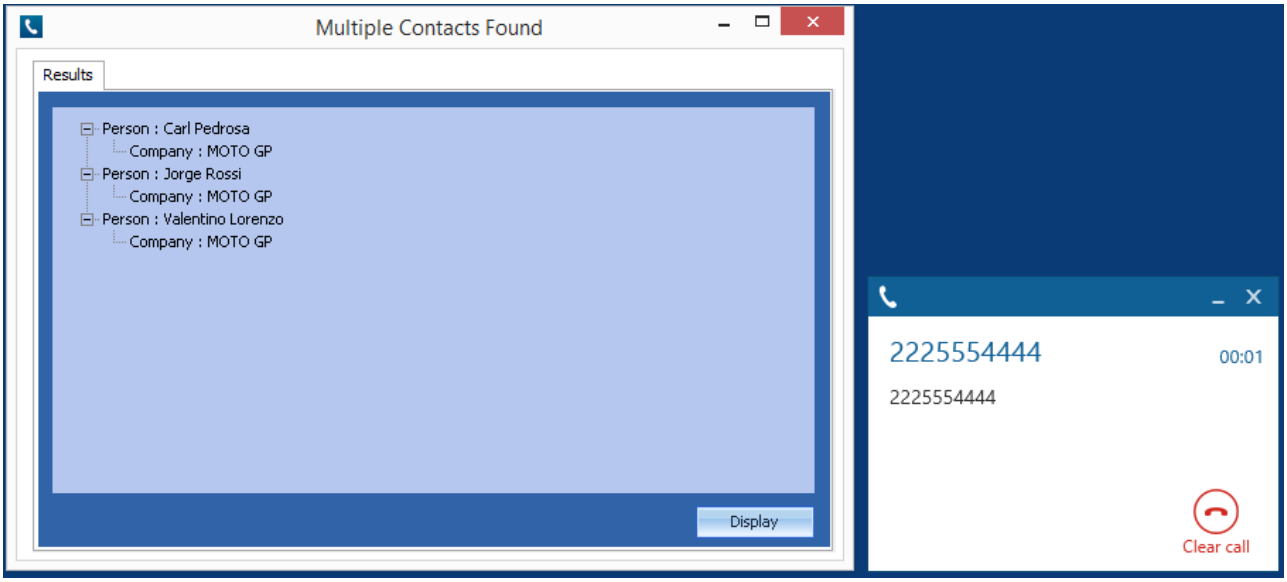
- Screen pop for contacts

Screen pop

CRM *Person*, *Company* and/or *Lead* entities can be screen popped directly within CRM when an incoming call is received using the caller id or from an outgoing call using the dialed number. The telephone number is then used to find any matching entities that have this number. For example an inbound call is received from 7774441111 as shown on the toaster. The plugin performs a search to find any records that have matching telephone numbers. A matching *Person* entity was found and the record was automatically displayed using the Users default browser.



If multiple matches are found then the *Multiple Contacts Found* is shown and enables the User to select the correct record to be displayed. For example a call is made to 222555444 and this has found three matching *Person* entities that have this telephone number.

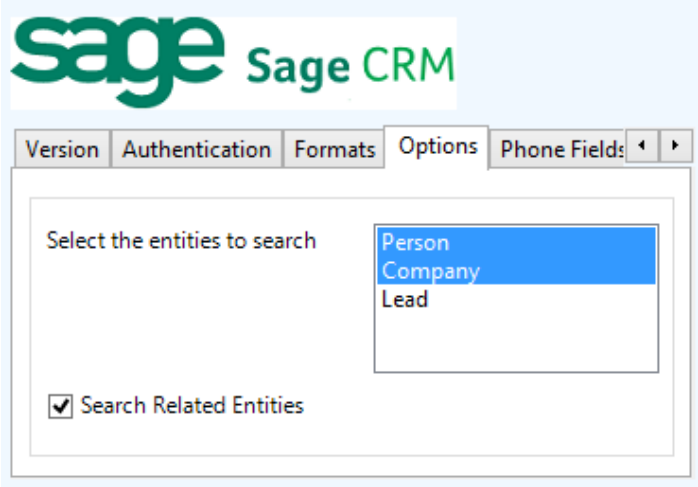


The correct Entity can then be highlighted and then clicking on the *Display* button will open this record.

Entity and matching options

Configuration options are available on the plugin that allow the type of *Entities* to be used in the searching to be set. For example it can be configured so that only the *Person* and *Company* Entities are searched. These options are set on the *Options* tab.

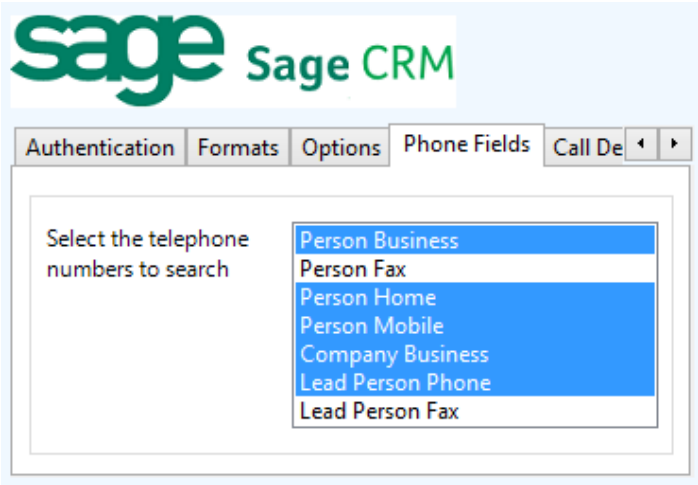
Selecting the *Search Related Entities* option will enable any matching records that have a related entity to be displayed on the *Multiple Contacts Found* window.



If no match is found then no records will be displayed.

Search fields

The range of telephone numbers that are to be searched for can be configured for each of the *Person*, *Company* or *Lead* Entities individually. By default the common telephone number fields are listed on the *PhoneFields* tab.



These are the default field names and may be different if they have been customised. Contact your Sage CRM administrator for details.

Contact Entities

Entity Type	Field name	Enabled?
Person	Business	✓
Person	Fax	✓
Person	Home	✓
Person	Mobile	✓
Company	Business	✓
Lead	Person Phone	✓
Lead	Person Fax	✓
Lead	Alternate Phone	✓

Telephone number formats

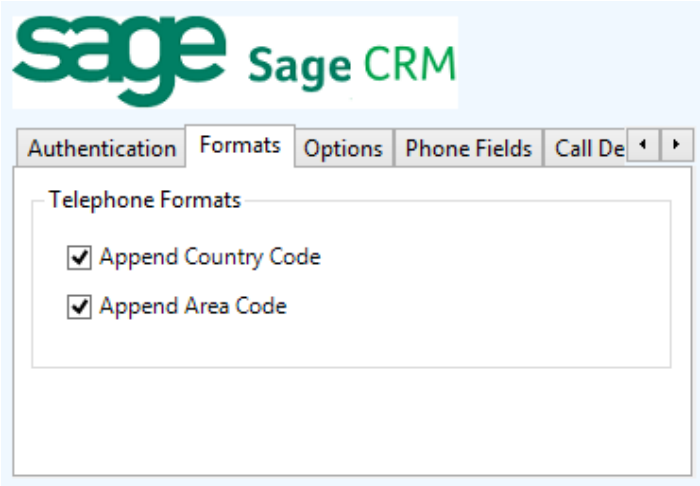
Sage CRM does not provide a standard format for storing telephone numbers within the system by default. The plugin supports searching for multiple different formats dependent on the region (UK or US) where the client is running. The default formats for the UK and International are shown below. This is based on the number 08001831234 been searched for.

UK & International Telephone Formats			
08001831234	(0123) 4567890	44 (08001)831234	+44 (080)0183 1234
08001 831234	08001-831234	(08001)831234	(08001)-831234
080 018 31234	080-018-31234	080 0183 1234	080-0183-1234

The default formats for the US are shown below. This is based on the number 9876543210 been searched for.

US Telephone Formats			
9876543210	987.654.3210	+1 (987) 654-3210	19876543210
987-654-3210	(987) 654-3210	1-987.654.3210	1-987-654-3210
1(987) 654-3210			

Sage CRM stores the country code and area code parts of each telephone number separately from the main number. From the *Formats* tab the country and area codes can be set to be appended to the telephone number when a search is made.



For example if the number, 01611234567 is stored within Sage CRM as:

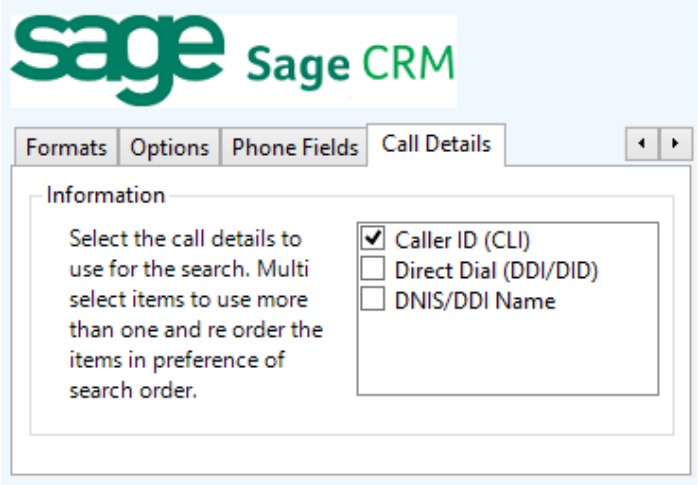
- Country Code: 44
- Area Code: 0161
- Number: 1234567

The following telephone numbers would be searched for:

- If the Append Country Code and Append Area Code are not set: 1234567
- If the Append Country Code is set and Append Area Code is not set: 441234567
- If the Append Country Code is not set and Append Area Code is set: 01611234567
- If both the Append Country Code and Append Area Code are set: 4401611234567

Call details

The call information that is used to search for matching records can be configured. By default the dialed number or the caller id are used to search with, depending on the call direction, but other call details can configured. There are options for the direct dial number or the direct dial name (or DNIS) as shown.


Sage CRM
Formats
Options
Phone Fields
Call Details
Information
Select the call details to use for the search. Multi select items to use more than one and re order the items in preference of search order.
Caller ID (CLI)
Direct Dial (DDI/DID)
DNIS/DDI Name

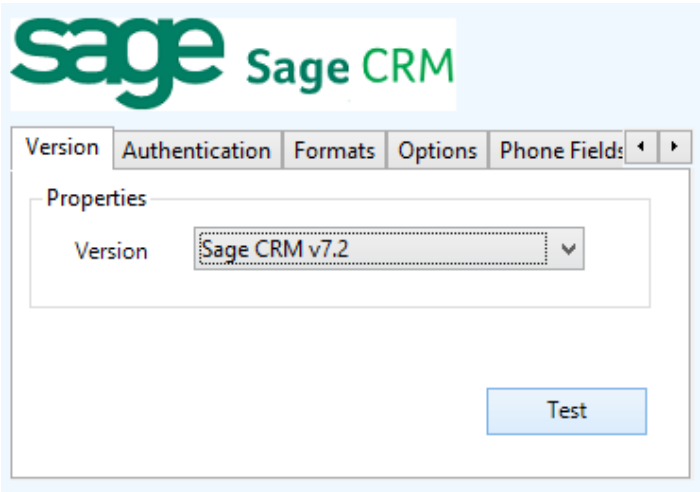
Caller ID represents either the caller ID for inbound calls or the dialed number for outbound calls.

The configuration box lets you select multiple different types of call detail with the details to be used having the check box next to each one selected. The order of the searching can also be configured by dragging and dropping the entry and ordering the list accordingly.

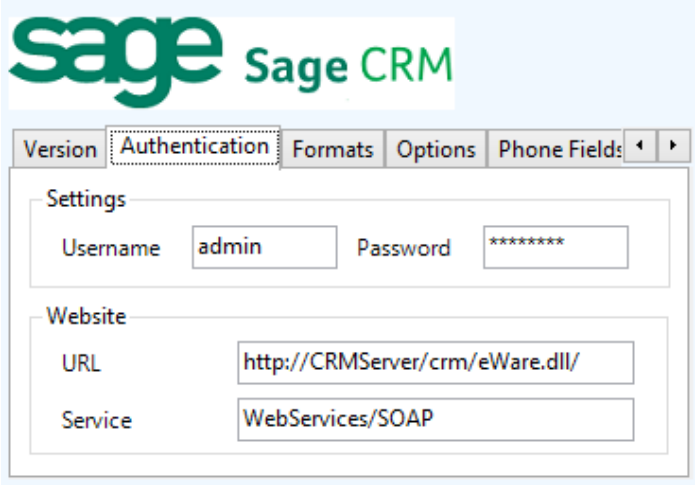
When multiple call details are used the searching will stop as soon as a match is found with the first call detail.

Configuration

The integration needs to be configured for the correct version of Sage CRM that is running. From the *Version* tab select the relevant entry from the drop down list.



The authentication and server connection details to the CRM server need to be set on the *Authentication* tab.



A valid Sage CRM username and password that has the web service option enabled is required to be configured into the *Username* and *Password* fields. To enable a user for web services, from Sage CRM:

1. Select Administration -> Users -> Users
2. Select Change action button
3. In Security panel set Allow Web Service Access field to True

> Only one web service user can logon with the same ID at any given time. If a user tries to logon as another applic an error will be displayed informing the user that they should first log out. However, it is possible to logon to the desktop or from a device with the same ID while a Web Service application is running.

The plugin uses the Sage CRM web services to integrate and this needs to be enabled on the Sage CRM server. This can be enabled from within Sage CRM:

1. Select Administration -> System -> Web Services
2. Select Change action button
3. Check the enable web service option

The web service URL can then be configured into the *URL* section. For example if the server name is called *mycrmserver* then enter:

- http://mycrmserver/crm/eWare.dll/

Troubleshooting

When integrating with Sage CRM v7.1+ the plugin uses the PhoneLink table within Sage CRM and this needs to be made available through the Sage CRM web service. If this is not enabled this error will be shown in the log files:

```
System.Web.Services.Protocols.SoapHeaderException:
Request Failed. Entity 'phonelink' is not Web Service enabled.
```

To enable this follow this procedure:

1. Log in to Sage CRM SQL Server
2. Select Sage CRM database
3. Click on the New Query button
4. Run:
    - `update Custom_Tables set bord_WebServiceTable='Y' where Bord_Caption ='phonelink'`
5. Run the IISRESET command
6. Login to the Sage CRM system.

5.5.6 SalesForce

Overview

This describes the features that are available when integrating with SalesForce.

Supported Versions

The following SalesForce versions are supported.

Edition	Supported
Contact Manager	✗
Group	✗
Professional	✓ £
Enterprise	✓
Performance	✓

£ - Additional SalesForce fees may apply

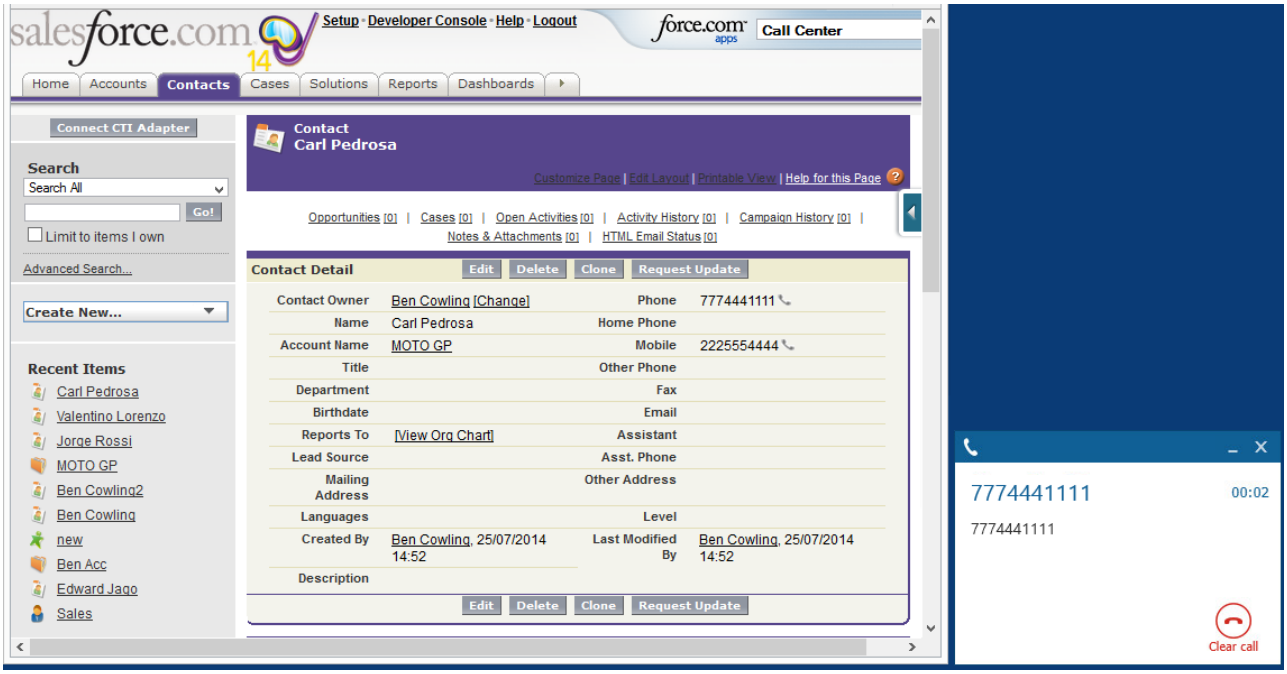
Features

Integration with SalesForce supports the features listed below:

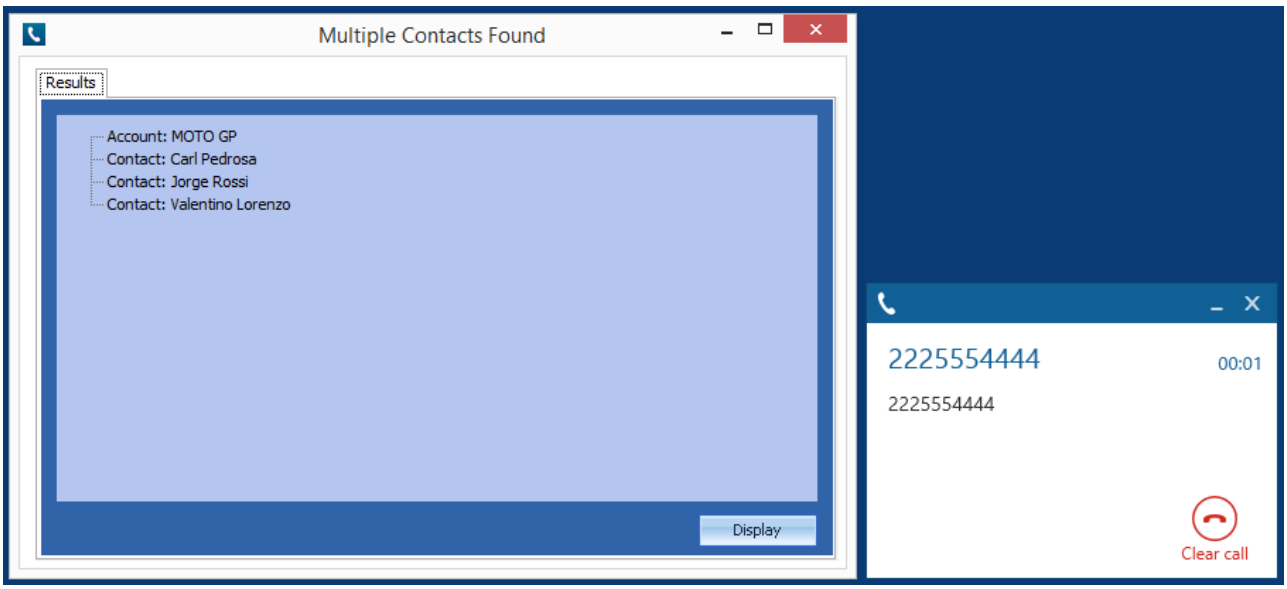
- Screen pop for contacts
- Automatic call history entry

Screen pop

CRM *Contact*, *Account* and/or *Lead* entities can be screen popped directly within SalesForce when an incoming call is received using the caller id or from an outgoing call using the dialled number. The telephone number is then used to find any matching entities that have this number. For example an inbound call is received from 7774441111 as shown on the toaster. The plugin performs a search to find any records that have matching telephone numbers. A matching *Contact* entity was found and the record was automatically displayed using the Users default browser.



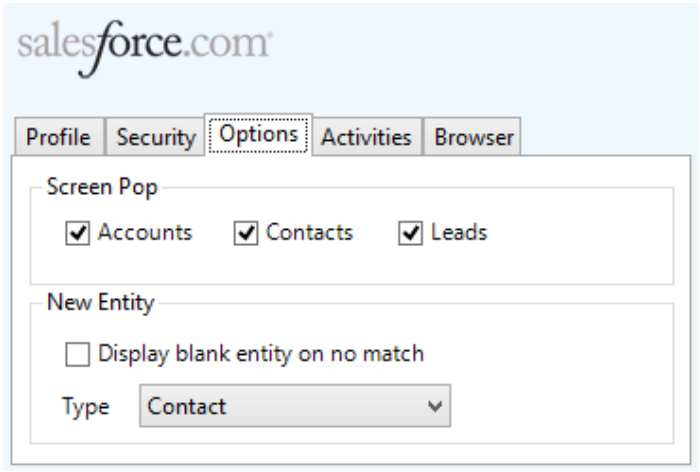
If multiple matches are found then the *Multiple Contacts Found* window is shown and enables the User to select the correct record to be displayed. For example a call is made to 222555444 and this has found one matching *Account* entity and three matching *Contact* entities that have this telephone number.



The correct entity can then be highlighted and then clicking on the *Display* button will open this record.

Entity and matching options

Configuration options are available on the plugin that allow the type of *Entities* to be used in the searching to be set. For example it can be configured so that only the *Contact* entities are searched. These options are set on the *Options* tab



If no match is found when searching for an Entity than a blank form can be automatically displayed to create a New Entity. The Type of Entity, *Contact*, *Account* or *Lead* that is created can be set here.

Search fields

The range of telephone numbers that are to be searched are not configurable. All SalesForce fields that are have the *phone* type will be used.

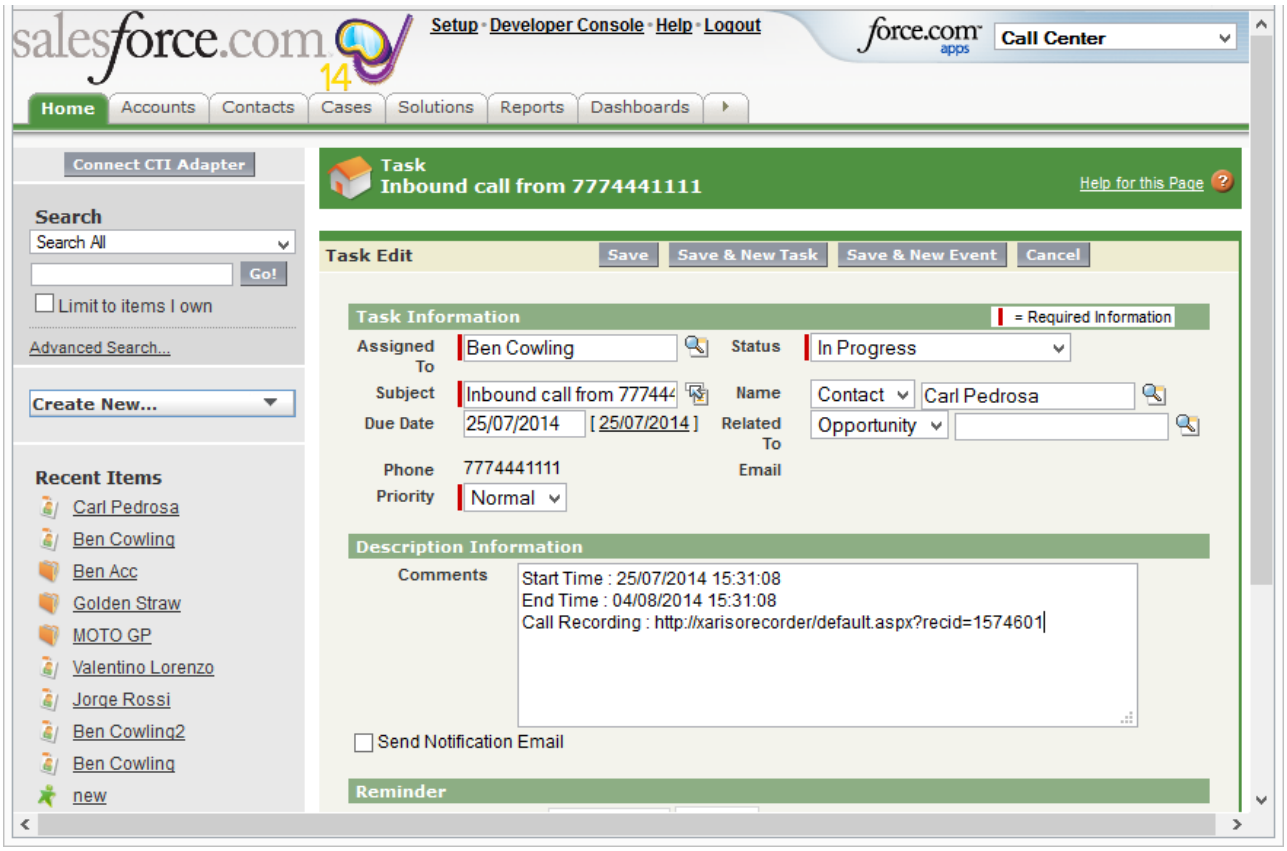
Step 1. Choose the field type
Step 1
Next
Cancel
Specify the type of information that the custom field will contain.
Data Type
None Selected
Select one of the data types below.
Auto Number
A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
Formula
A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
Roll-Up Summary
A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
Lookup Relationship
Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
Checkbox
Allows users to select a True (checked) or False (unchecked) value.
Currency
Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
Date
Allows users to enter a date or pick a date from a popup calendar.
Date/Time
Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the popup, that date and the current time are entered into the Date/Time field.
Email
Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
Geolocation
(Beta) Allows users to define locations.
Number
Allows users to enter any number. Leading zeros are removed.
Percent
Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
Phone
Allows users to enter any phone number. Automatically formats it as a phone number.
Picklist
Allows users to select a value from a list you define.
Picklist (Multi-Select)
Allows users to select multiple values from a list you define.
Text
Allows users to enter any combination of letters and numbers.

The format of the telephone number does not make any difference as any type of format is supported. The number dialled/received is used for the searching.

Automatic call history entry

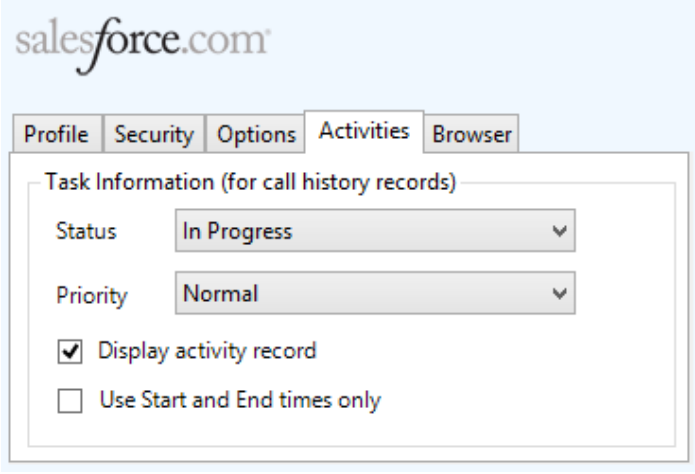
The plugin supports the ability to be able to automatically create and display a SalesForce Phone Task entity. The Entity to associate this with is found using the caller id received or the number dialled, and if multiple matches are found then the *Multiple Contacts Found* window is shown as for the screen popping. The telephone numbers used to search are set in the screen popping section.

The Activity record is automatically created with the information relating to the call entered into the *Comments* field and the related entities are linked as shown.



Phone number	For inbound calls this is the caller ID and for outbound calls this is the dialled number.
DDI/DID	For external inbound calls only, the DDI/DID number that the call came in on.
DDI/DID Name	For external inbound calls only, the DNIS of the DDI/DID that the call came in on.
Direction	The direction of the call.
Account Code	The account codes that was set on the call.
Trunk	For external calls the outside network trunk number that the call was made or receivec
Transferring Extension	The device that the call was transferred from.
Duration	The duration of the call. The call event trigger must have been set to Call End as they not known until the call is cleared.
Call Recording	If integrating with a Xarios Call Recorder then this can contain a URL link to the call recording (this is not a clickable hyperlink but can be copied and pasted into a browser The call event trigger must have been set to at least Call Answered as the call recorde only create the recording id when the call has been answered.

The plugin configuration has several options that can be set to determine how the record is created.



Status: This allows the type of *Status* for the task to be configured. Valid options are: *Not Started*, *In Progress*, *Completed*, *Waiting on someone else*, *Deferred*.

Priority: This will set the priority of the Task to be *High*, *Normal* or *Low*.

Display activity record: If this is set then the Task will be displayed when it's created in a new browser window.

Use Start and End times only: If this is set then only the start and end time will be populated into the *Comments* section for a call history entry.

Configuration

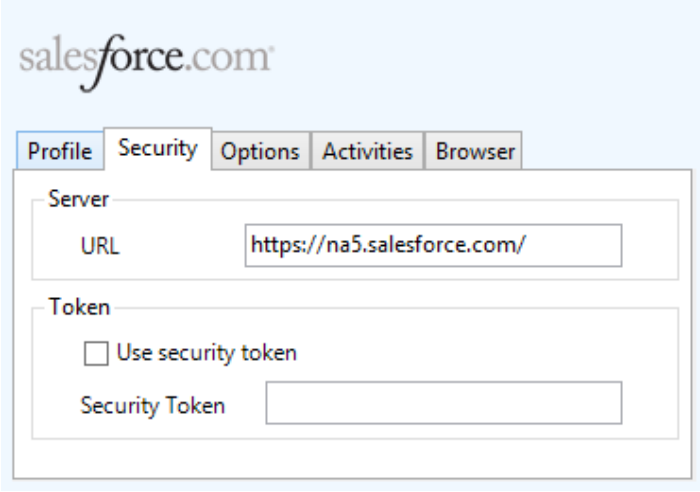
For any of the features there needs to be some basic configuration that needs to be performed to authenticate and allow access to SalesForce.

User authentication

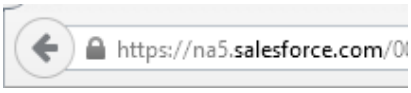
The plugin requires a valid SalesForce username and password to be entered. These are the details that will be used for searching and creating history records. Ensure that the user has the appropriate permissions within SalesForce to do this. As a minumum they need to have the *API Enabled* flag set on their *Profile*.

Security

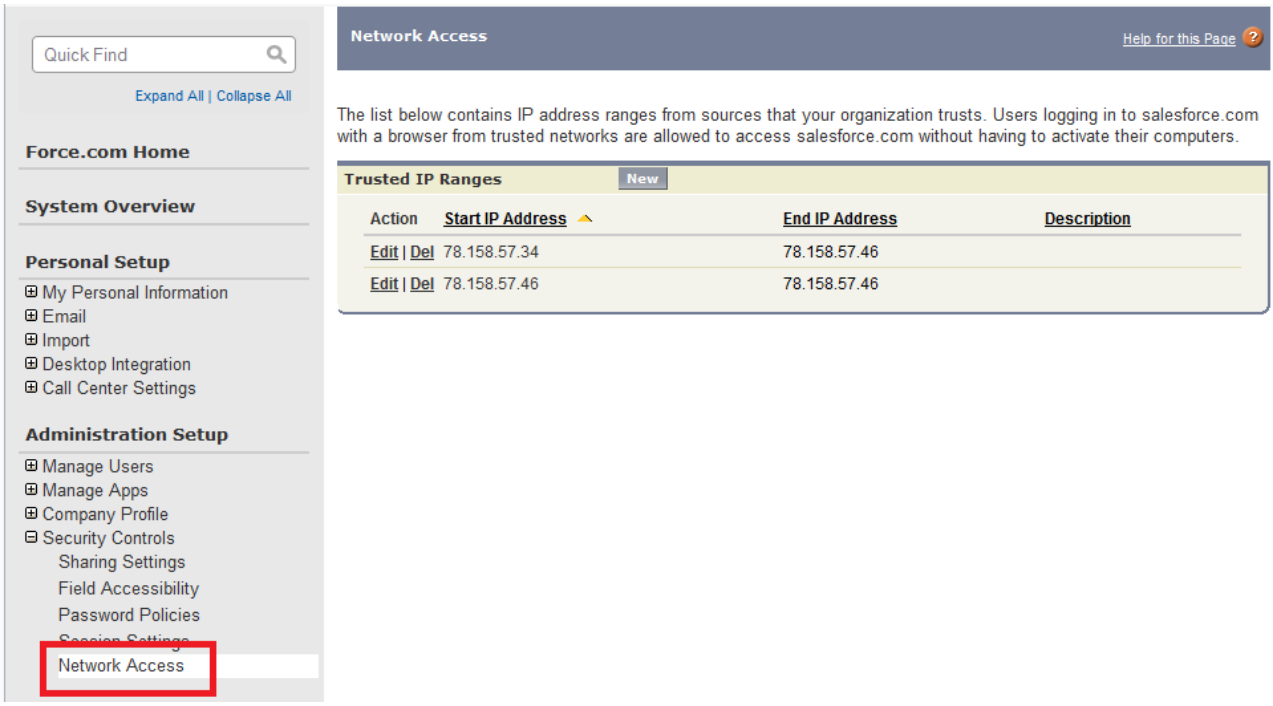
The Security tab enables the type of access and location of the Salesforce services to be set.



Server -> URL: This should be set to SalesForce server that your organisation uses. This can be found by looking at the URL that is displayed in the address bar of the web browser once you have logged into SalesForce.

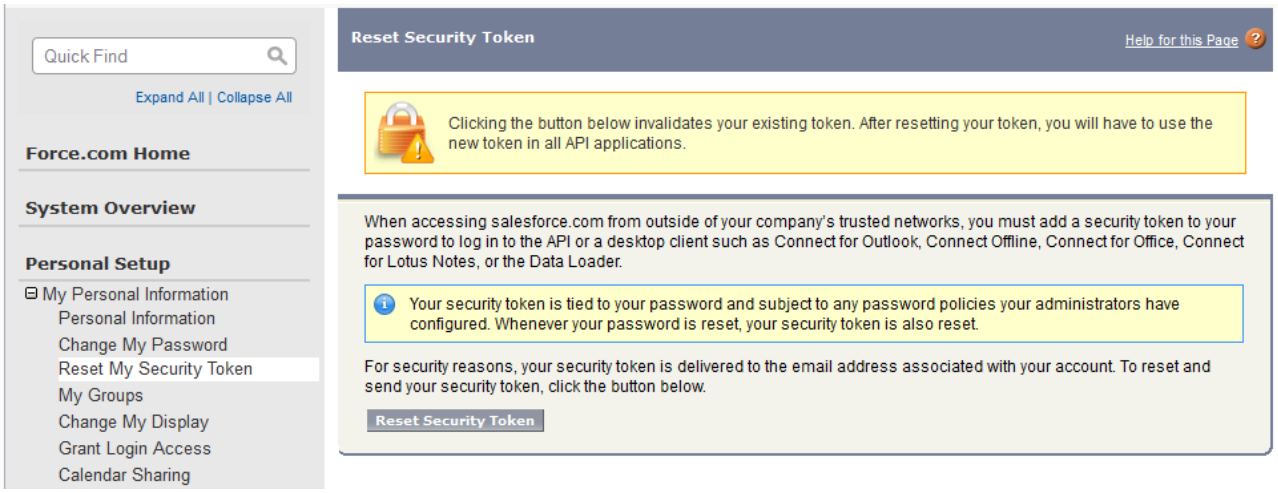


Token: Depending on the security configuration of SalesForce and how it is accessed will dictate what options are required. To connect to the SalesForce API requires that the public IP address that the user is connecting from is configured in the *Administration Setup -> Network Access* section under *Trusted IP Ranges.*



If this cannot be configured, for example if you have remote workers whose IP address changes all the time. Then the Security Token option will need to be enabled.

To create a Security Token from the *Personal Setup -> My Personal Information- > Reset My Security Token* section of Salesforce.com, select the *Reset Security Token* button. This will send an email to the associated user with their Security Token.


Quick Find
Expand All | Collapse All
Force.com Home
System Overview
Personal Setup
My Personal Information
Personal Information
Change My Password
Reset My Security Token
My Groups
Change My Display
Grant Login Access
Calendar Sharing
Reset Security Token
Help for this Page
Clicking the button below invalidates your existing token. After resetting your token, you will have to use the new token in all API applications.
When accessing salesforce.com from outside of your company's trusted networks, you must add a security token to your password to log in to the API or a desktop client such as Connect for Outlook, Connect Offline, Connect for Office, Connect for Lotus Notes, or the Data Loader.
Your security token is tied to your password and subject to any password policies your administrators have configured. Whenever your password is reset, your security token is also reset.
For security reasons, your security token is delivered to the email address associated with your account. To reset and send your security token, click the button below.
Reset Security Token

The email will contain the token and will look similar to the one shown below:

- y67lBpMdiBY02RkbDWqwhCEX

This value then needs to be entered into the Security Token section.

5.5.7 SalesLogix

Overview

This describes the features that are available when integrating with SalesLogix.

Supported Versions

The following SalesLogix versions are supported.

Version	Supported
Version 7.0	*^
Version 7.1	*^
Version 7.2	^
Version 7.5 SP2	^

* - Click to dial feature is not supported
^ - Requires the Windows LAN client

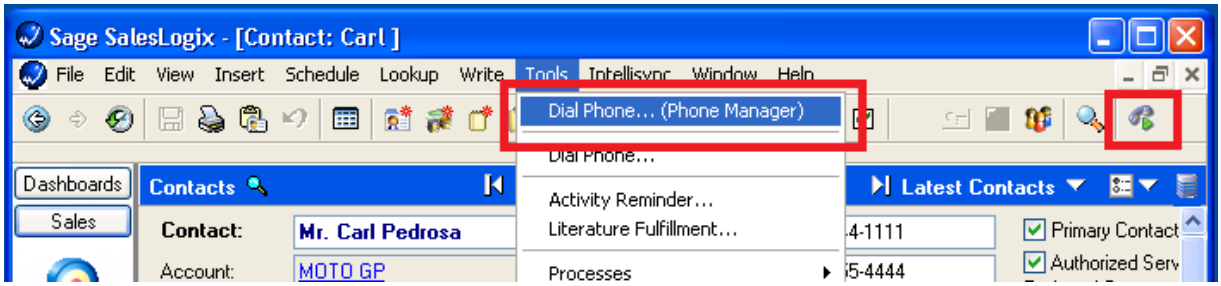
Features

Integration with SalesLogix supports the features listed below:

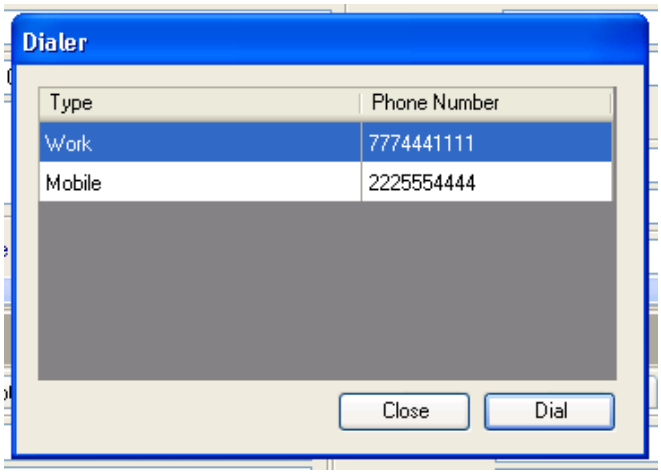
- Click to dial
- Screen pop
- Automatic call history entry
- Calendar & DND synchronisation

Click to dial

When a record is displayed a new telephone icon is shown on the toolbar and a *Dial Phone* entry in added to the SalesLogix *Tools* menu.



When the telephone icon is clicked a new window is displayed that shows all of the telephone numbers that are available for this record.



Selecting any of the rows and clicking *Dial* or double clicking the row will cause the selected number to be called.

This requires Phone Manager to be running in the same Windows session as SalesLogix.

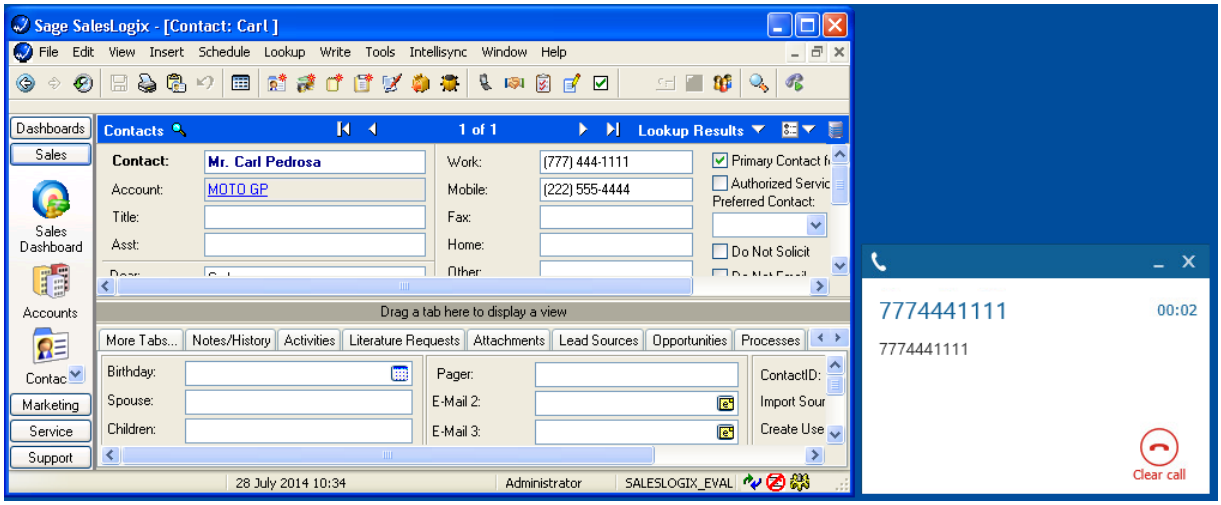
If the screen popping feature is also been used then this should only be configured for Inbound Calls, so as not to screer on outbound.

This direct dial out replaces the built in TAPI based “Dialler” feature within SalesLogix and should not be used at the sam time.

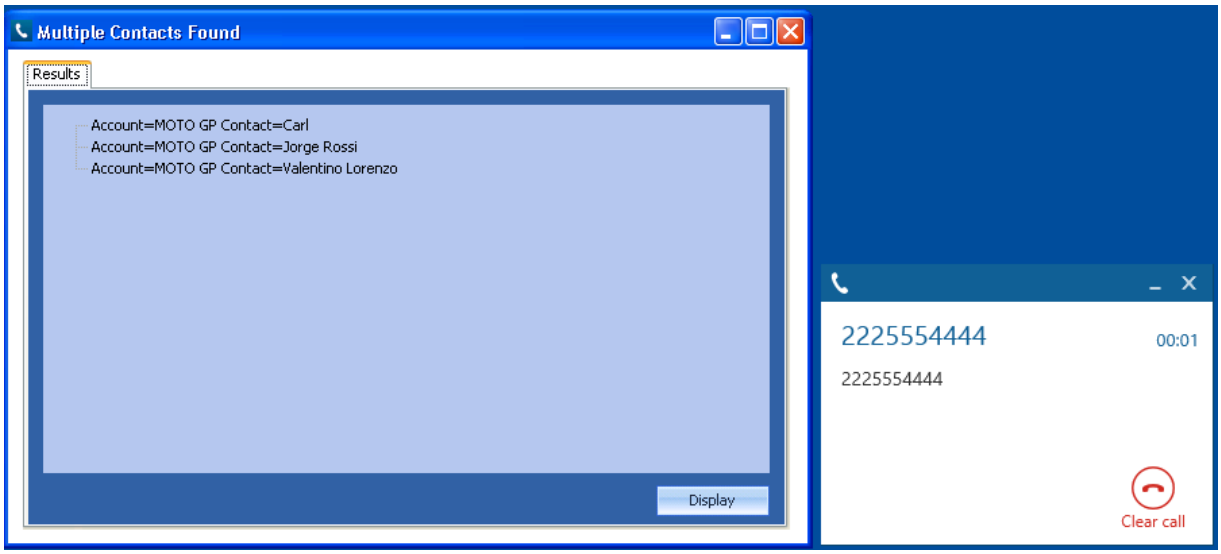
The SalesLogix bundle is available on request and needs to be installed by your SalesLogix administrator (see the Sales Bundle section for details)

Screen pop

CRM *Contact*, *Account* and/or *Lead* entities can be screen popped directly within SalesLogix when an incoming call is received using the caller id or from an outgoing call using the dialled number. The telephone number is then used to find any matching entities that have this number. For example an inbound call is received from 7774441111 as shown on the toaster. The plugin performs a search to find any records that have matching telephone numbers. A matching *Contact* entity was found and the record was automatically displayed with SalesLogix.



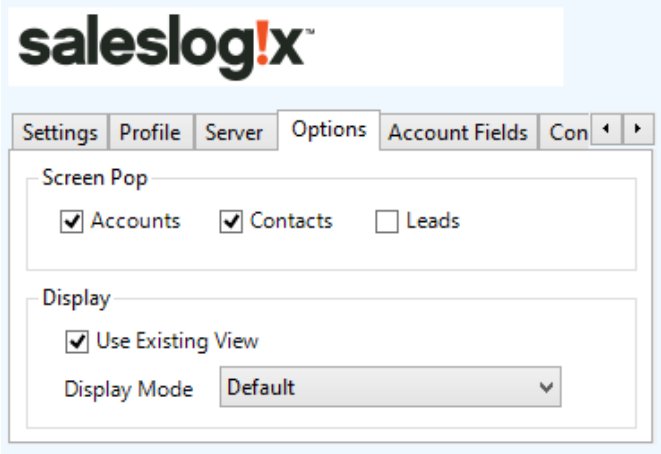
If multiple matches are found then the *Multiple Contacts Found* window is shown and enables the User to select the correct record to be displayed. For example a call is made to 222555444 and this has found three matching *Contact* entities that have this telephone number.



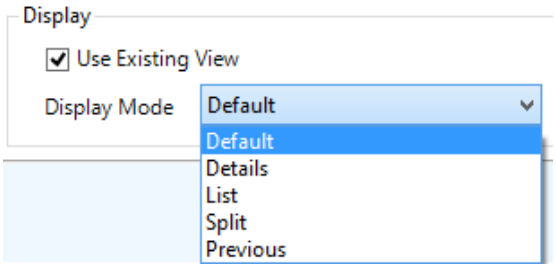
The correct entity can then be highlighted and then clicking on the *Display* button will open this record.

Entity and matching options

Configuration options are available on the plugin that allow the type of records to be used in the searching to be set. For example it can be configured so that only the *Contact* entities are searched. These options are set on the *Options* tab.



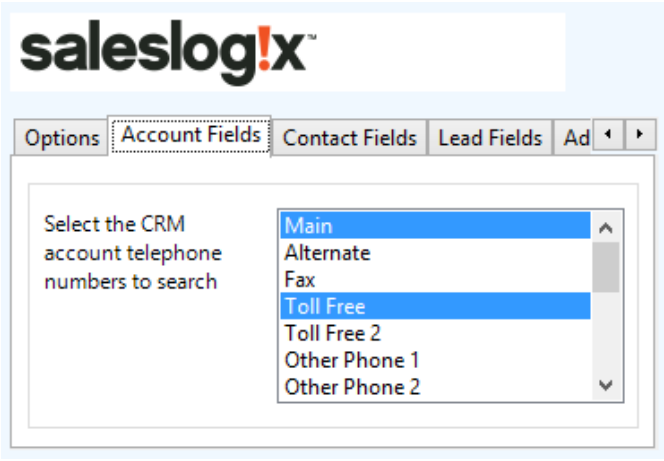
When SalesLogix is screen popped the display mode for how any matching records are shown can be configured as shown.



Selecting the *Use Existing View* option will use the current view settings. These settings are equivalent to the options available in the *View* menu within SalesLogix.

Search fields

The range of telephone numbers that are to be searched for can be configured for each of the *Contact*, *Account* or *Lead* records individually. By default the common telephone number fields are listed in the *Leads Fields*, *Contacts Fields* or *Account Fields* tab.



Contact Entities

Field name	Enabled?
Work	✓
Mobile	✓
Fax	✗
Home	✓
Other	✓
Pager	✗
User Field 1	✗
User Field 2	✗
User Field 3	✗
User Field 4	✗
User Field 5	✗
User Field 6	✗
User Field 7	✗
User Field 8	✗
User Field 9	✗
User Field 10	✗

Account Entities

Field name	Enabled?
Main	✓
Alternate	✗
Fax	✗
Toll Free	✓

Toll Free 2	✗
Other Phone 1	✗
Other Phone 2	✗
Other Phone 3	✗
User Field 1	✗
User Field 2	✗
User Field 3	✗
User Field 4	✗
User Field 5	✗
User Field 6	✗
User Field 7	✗
User Field 8	✗
User Field 9	✗
User Field 10	✗

Lead Entities

Field name	Enabled?
Work	✓
Home	✓
Mobile	✓
Fax	✗
Toll Free	✓
User Field 1	✗
User Field 2	✗
User Field 3	✗
User Field 4	✗
User Field 5	✗
User Field 6	✗
User Field 7	✗
User Field 8	✗
User Field 9	✗
User Field 10	✗

Telephone number formats

SalesLogix does not provide a standard format for storing telephone numbers within the system by default. The plugin supports searching for multiple different formats dependent on the region (UK or US) where the client is running. The default formats for the UK and International are shown below. This is based on the number 08001831234 been searched for.

UK & International Telephone Formats			
08001831234	(0123) 4567890	44 (08001)831234	+44 (080)0183 1234
08001 831234	08001-831234	(08001)831234	(08001)-831234
080 018 31234	080-018-31234	080 0183 1234	080-0183-1234

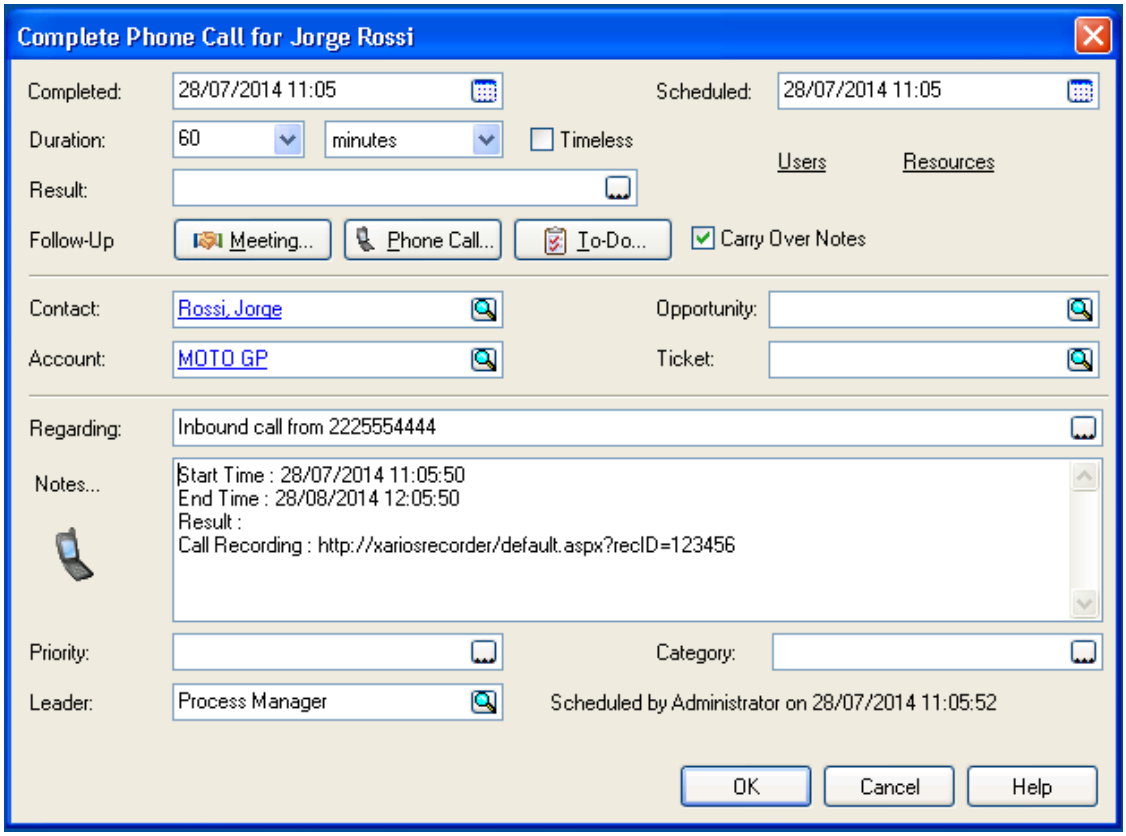
The default formats for the US are shown below. This is based on the number 9876543210 been searched for.

US Telephone Formats			
9876543210	987.654.3210	+1 (987) 654-3210	19876543210
987-654-3210	(987) 654-3210	1-987.654.3210	1-987-654-3210
1(987) 654-3210			

Automatic call history entry

The plugin supports the ability to be able to automatically create and display a SalesLogix Phone Call activity. The record to associate this with is found using the caller id received or the number dialled, and if multiple matches are found then the *Multiple Contacts Found* window is shown as for the screen popping. The telephone numbers used to search are set in the screen popping section.

The activity record is automatically created with the information relating to the call entered into the *Notes* field and the related records are linked as shown.



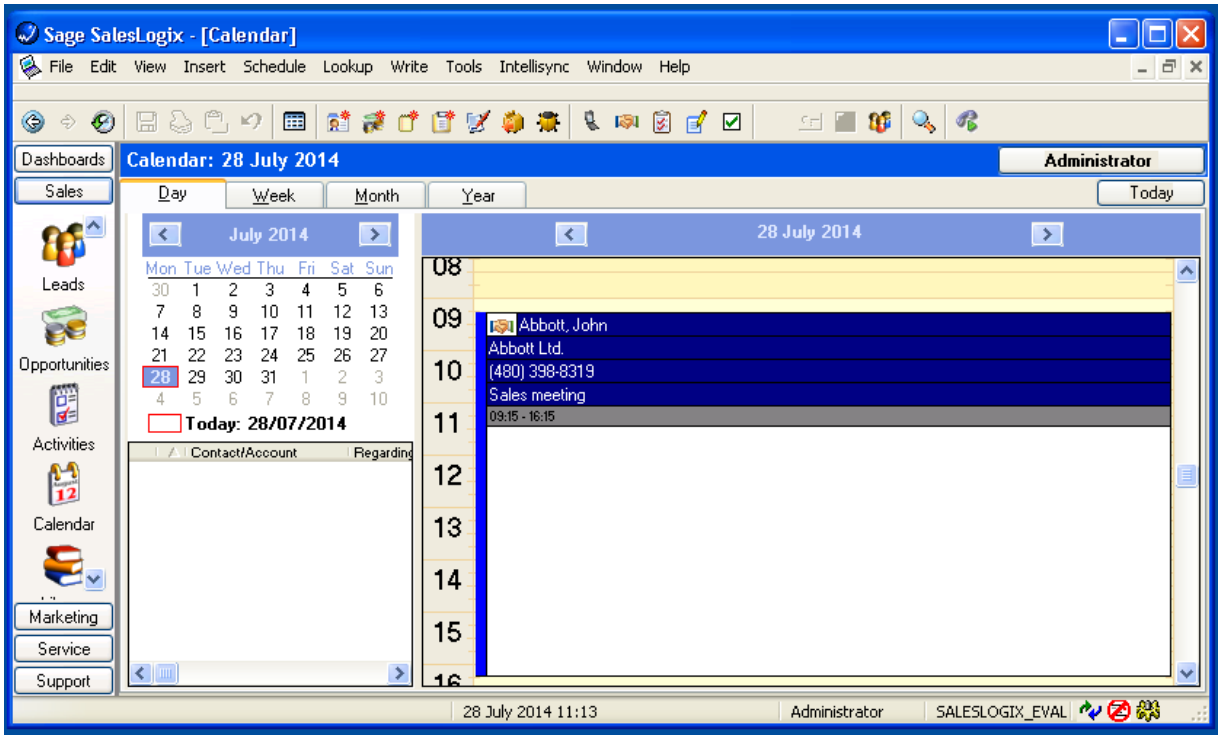
Start Time	The date and time when the call was started.
End Time	The date and time when the call was ended.
Result	The account code entered on the call.

Call Recording	If integrating with a Xarios Call Recorder then this can contain a URL link to the call recording is not a clickable hyperlink but can be copied and pasted into a browser). The call event trigge must have been set to at least Call Answered as the call recorder will only create the recordin when the call has been answered.

Calendar & DND synchronisation

The calendar within SalesLogix can be synchronised with the DND status of the endpoint of the User. For example when there is a meeting in the calendar and this is due the endpoint can be automatically placed into DND with the DND text set to the *Regarding* field of the appointment. When the appointment ends, the endpoint will be automatically removed from DND.

For example the *Meeting* entry below will place the Users endpoint into DND between 09:00 and 16.30 with the DND text set to "Sales meeting".

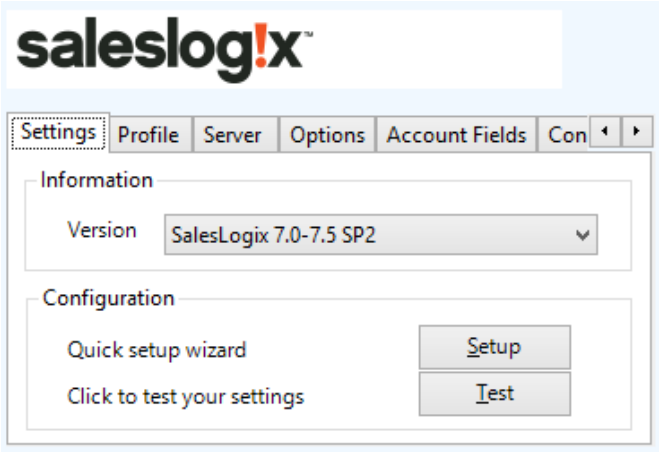


Configuration

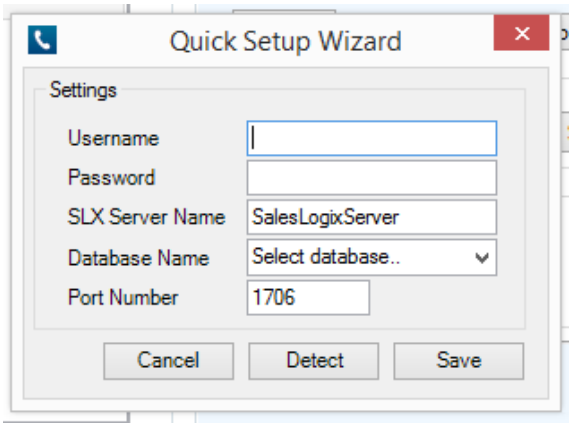
For any of the features there needs to be some basic configuration that needs to be performed to authenticate and allow access to SalesLogix.

Wizard

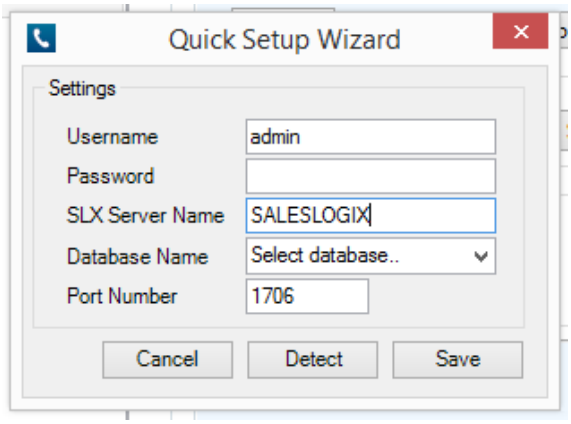
The *Settings* tab provides a *Quick Setup Wizard* to enable these to be easily configured.



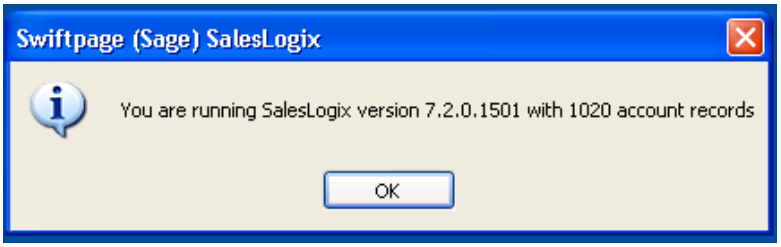
Click on the *Setup* button to start the wizard.



Ensure that SalesLogix is open and then click on *Detect* and this will complete the form automatically.



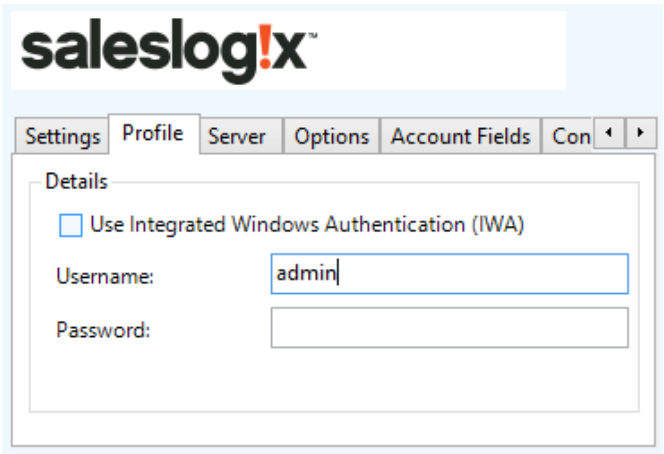
Select the *Database Name* for the SalesLogix database to use and then click *Save*. From the *Settings* tab click on the *Test* button to validate the details and a confirmation message will be displayed if the configuration is successful.



If this fails then more options can be configured on the other tabs.

Authentication profile

The Profile tab enables the security credentials used to access SalesLogix to be configured.

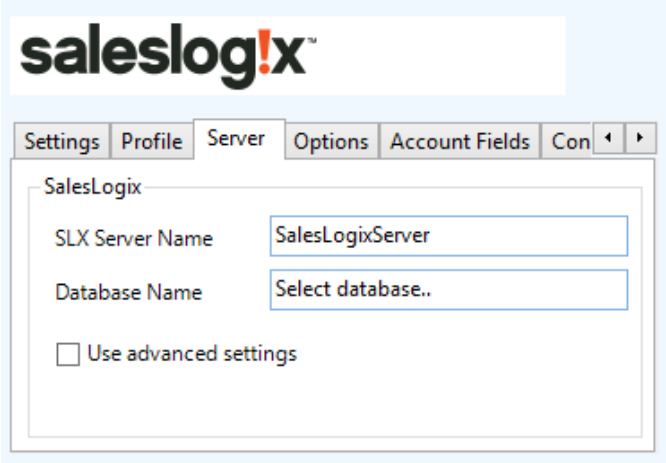


Use Integrated Windows Authentication: If this is set then the username, password and domain details from user who is logged on the computer will be used.

Depending on the configuration of Sage SalesLogix and how it is accessed will dictate what options are required. For example if a different user account is used to access SalesLogix than what is currently logged into the computer then they will need to be manually entered.

Server details

The *Server* tab enables the server details and database that is to be used to be configured.



SLX Server Name: The server name or IP address of the computer hosting the SalesLogix database.

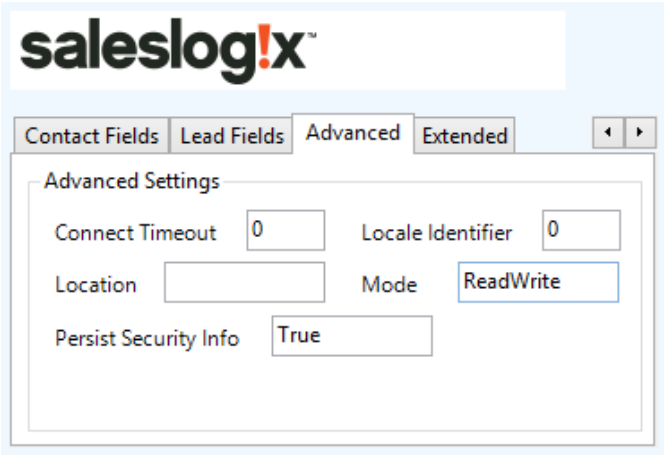
Database Name: The name of the SalesLogix database to use.

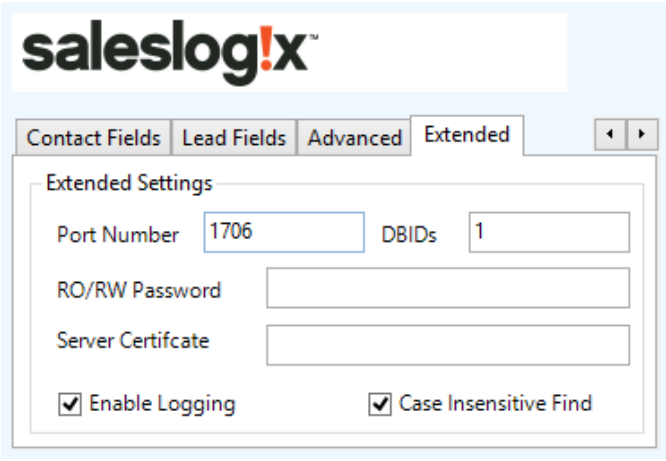
Advanced Settings: Enables the Advanced and Extended tabs for extra configuration options.

Advanced options

The *Advanced* and *Extended* tab enables more advanced options to be configured.

> These options are not normally required to be changed, contact your SalesLogix administrator for details.

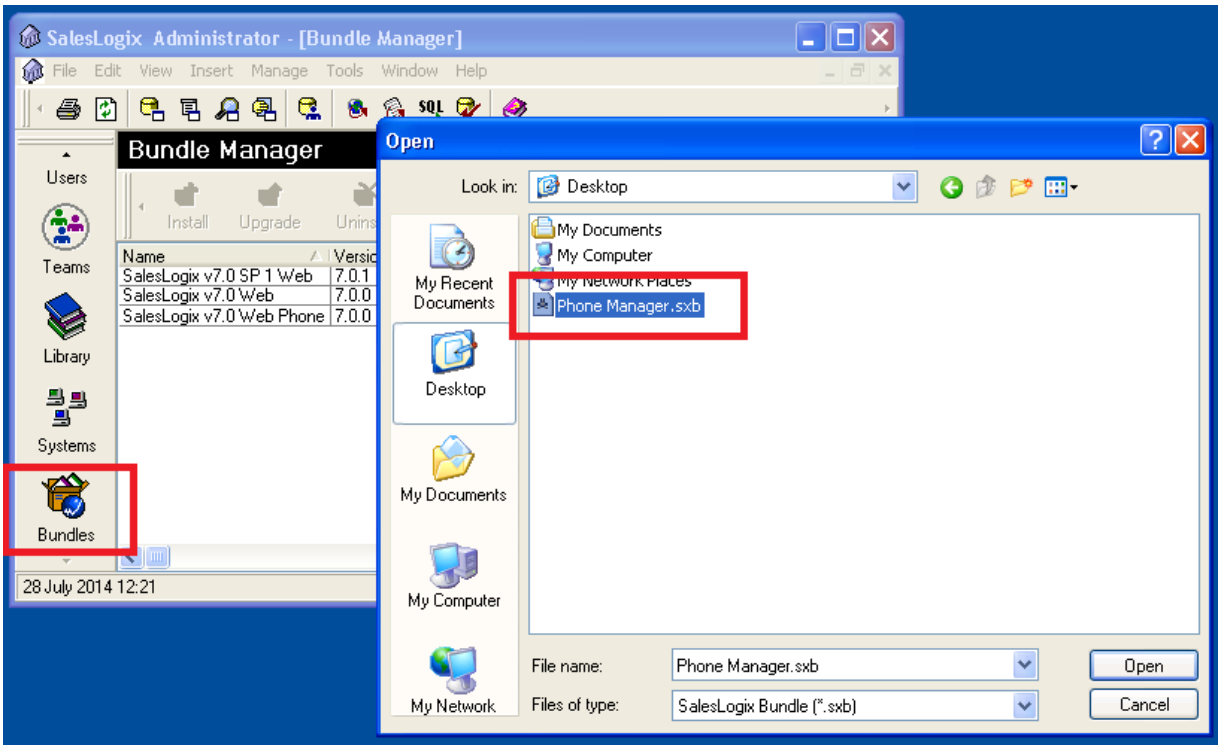




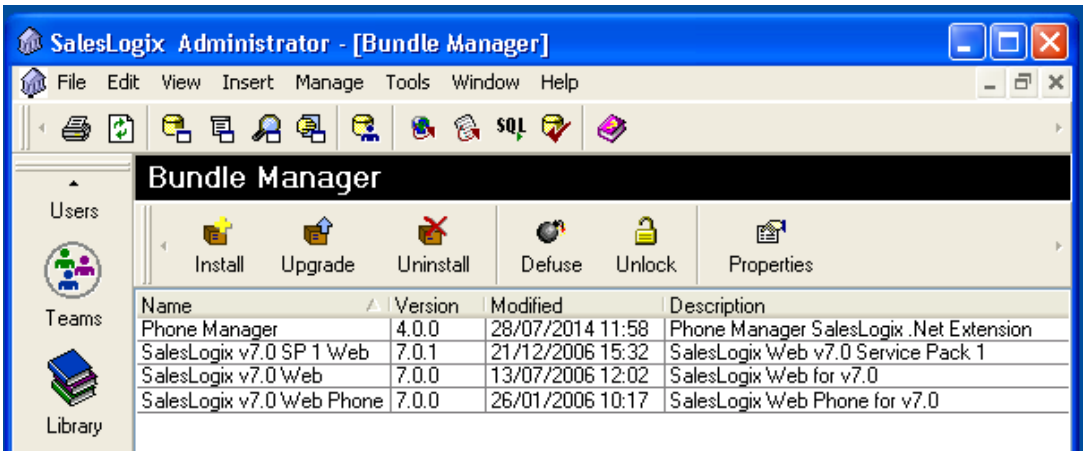
Sales Logix Bundle

SalesLogix allows for 3rd party integration components to be installed into the SalesLogix environment to provide additional features. To install the SalesLogix bundle the following steps need to be performed.

1. Run the SalesLogix Administrator Program.
2. Click the Bundles button.
3. Click the Install button.
4. Locate and select the Phone Manager Bundle.



5. Click OK on the Choose Actions To Install window.
6. If prompted select to allow the plugin to be released and select the group to release to.
7. The Phone Manager Bundle should then be displayed in the list.



8. Close SalesLogix Administrator Program.
9. Installation is complete, open SalesLogix.

5.5.8 Swiftpage Act!

Overview

This describes the features that are available when integrating with Swift Page Act!.

Supported Versions

The following Act! versions are supported.

Version	Supported
v15 (2013)	✅
v16 (2014)	✅

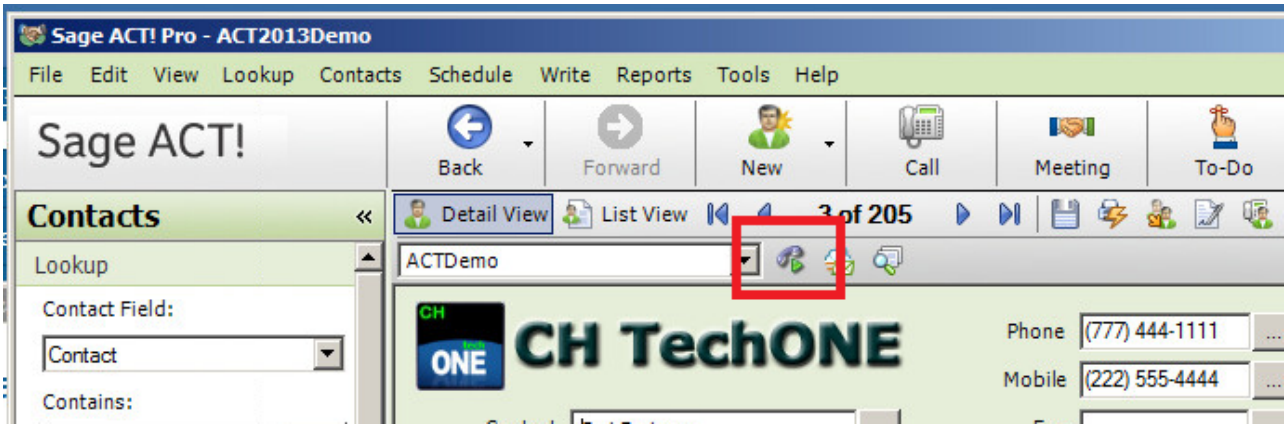
Features

Integration with Act! supports the features listed below:

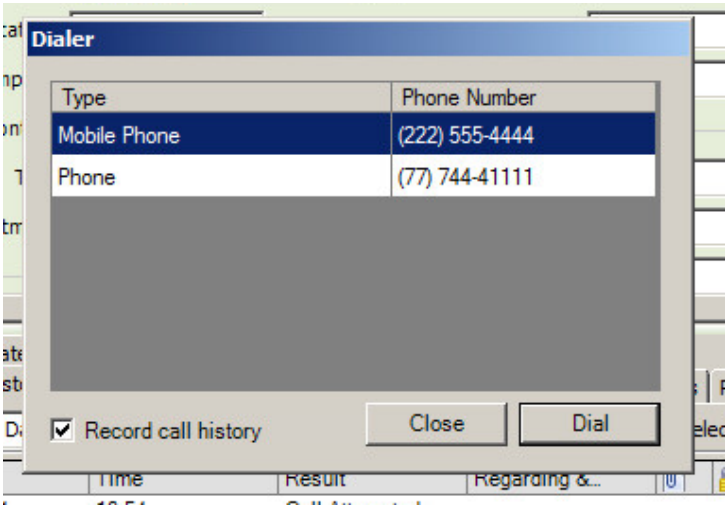
- Click to dial
- Screen pop for contacts
- Automatic call history entry
- Calendar & DND synchronisation

Click to dial

When a Contact record is displayed a new telephone icon is shown on the toolbar.



When the telephone icon is clicked a new window is displayed that shows all of the telephone numbers that are available for this contact.



Selecting any of the rows and clicking *Dial* or double clicking the row will cause the selected number to be called.

This requires Phone Manager to be running in the same Windows session as Act!.

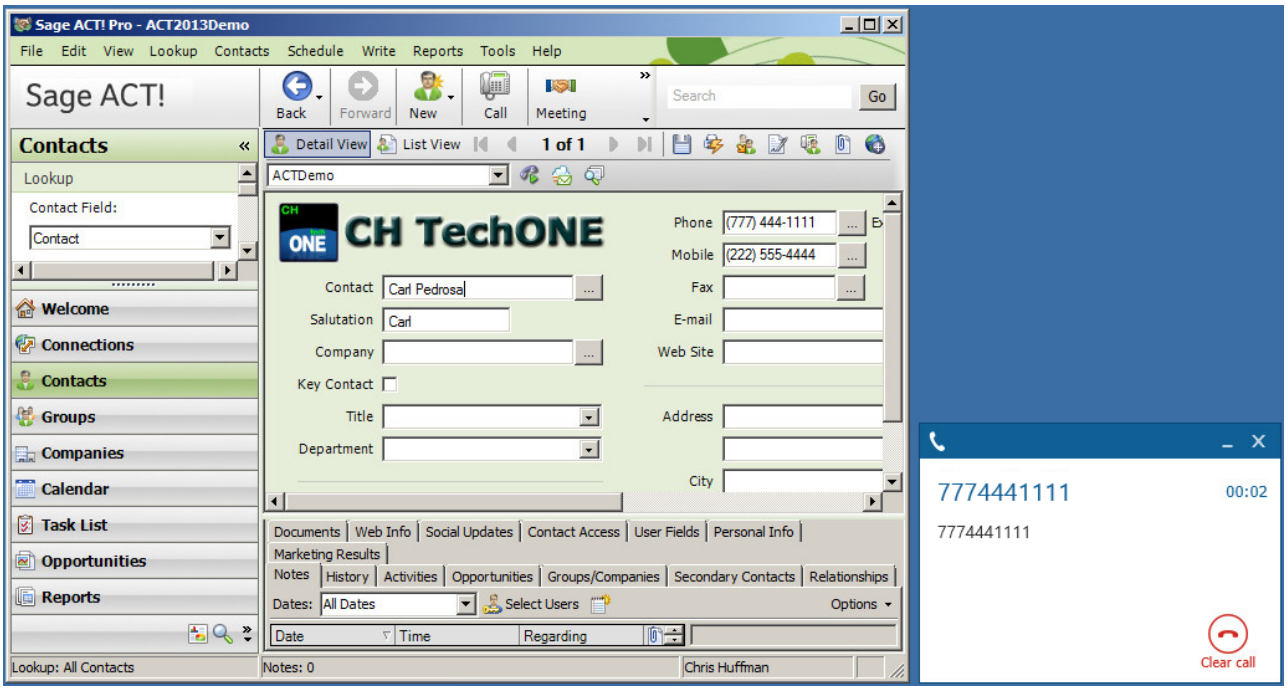
When an outbound call is made using this method a call history record can be created and opened once the Dial command has been selected. To enable this select the *Record call history* option on the form.

If the screen popping feature is also been used then this should only be configured for Inbound Calls, so as not to screen pop on outbound.

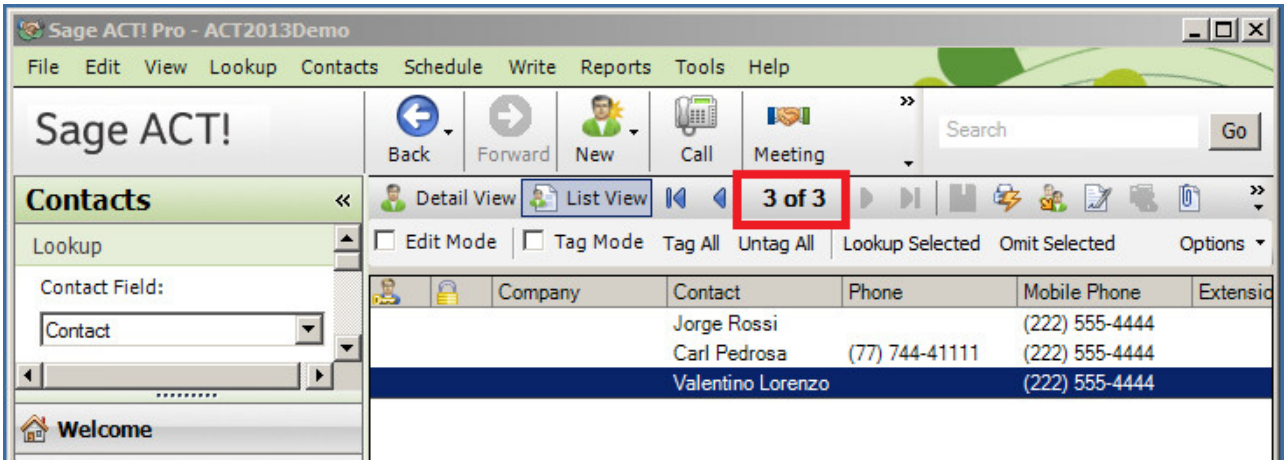
This direct dial out replaces the built in TAPI based “Dialler” feature within Act! and should not be used at the sam time. To disable the built in “Dialler” feature, from the menu bar select Tools -> Preferences -> Communication -> Dialler Preferences and un check the Use dialler option.

Screen pop for contacts

The Act! contacts can be screen popped directly within Act! when an incoming call is received using the caller id or from an outgoing call using the dialled number. The telephone number is then used to find any matching contacts that have this number. For example an inbound call is received from 7774441111 as shown on the toaster. The plugin performs a search on the contacts to find any records that have matching telephone numbers. A match was found and the contact record was automatically displayed.



If multiple matches are found then the current Act! view be filtered down for the relevant matches. For example a call is made to 222555444 and this has found three contacts that have this telephone number.


Sage ACT! Pro - ACT2013Demo
File Edit View Lookup Contacts Schedule Write Reports Tools Help
Sage ACT!
Back Forward New Call Meeting
Search Go
Contacts
Lookup
Contact Field:
Contact
Welcome
Detail View List View 3 of 3
Edit Mode Tag Mode Tag All Untag All Lookup Selected Omit Selected Options
Company Contact Phone Mobile Phone Extensio
Jorge Rossi (222) 555-4444
Carl Pedrosa (77) 744-41111 (222) 555-4444
Valentino Lorenzo (222) 555-4444

If no matches are found then there is a setting on the Options tab to enable a new *Contact* record to be created. The Phone field is set to the number received and this *Contact* is then displayed.

Contact fields

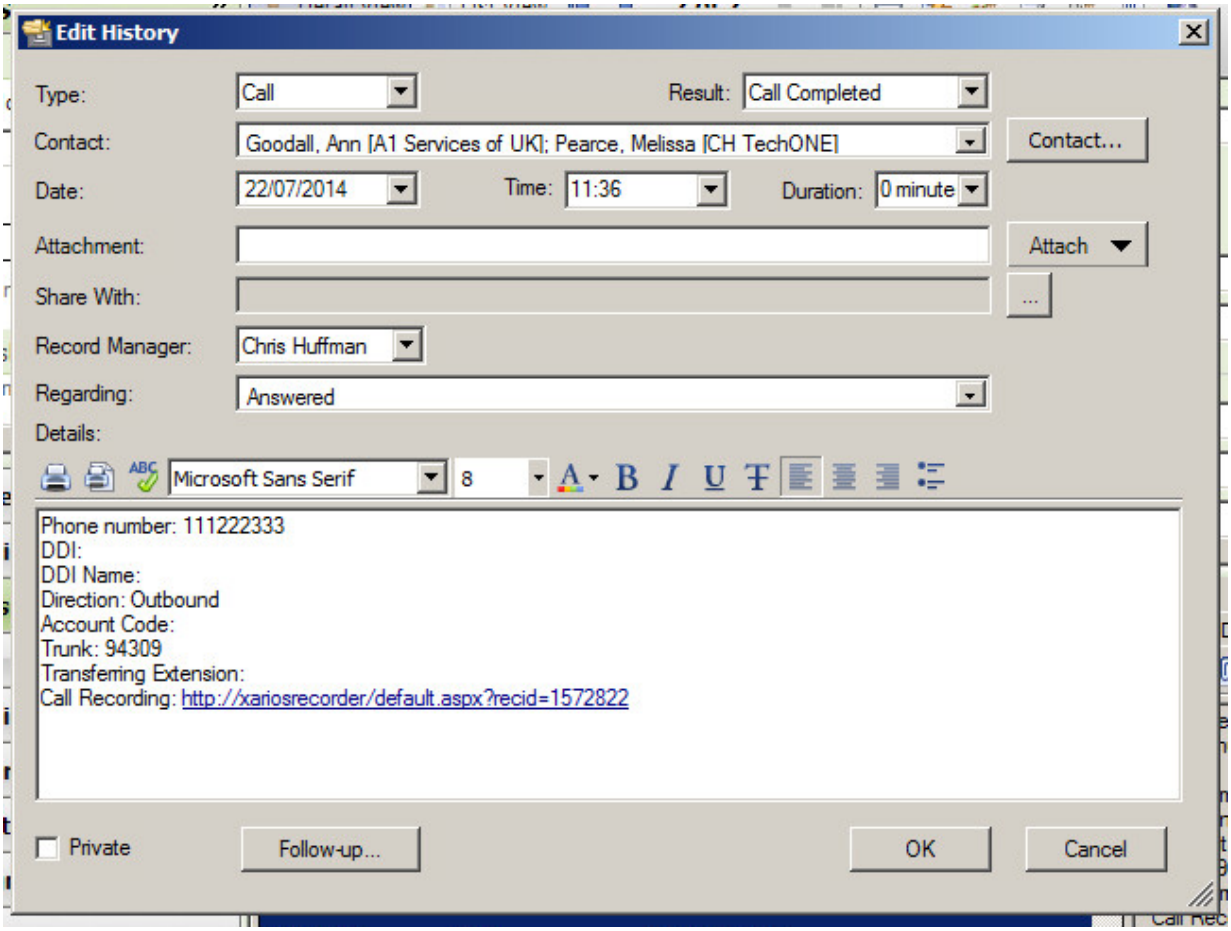
The range of telephone numbers that are to be searched for can be configured. By default the common telephone number fields are pre selected.

Act! Description	Act! Field Name	Enabled?
Business Phone	BUSINESS_PHONE	✓
Mobile Phone	MOBILE_PHONE	✓
Alternate Phone	ALTERNATE_PHONE	✓
Fax Phone	FAX_PHONE	✓
Home Phone	HOME_PHONE	✓
Pager Phone	PAGER_PHONE	✓

Automatic call history entry

Phone Manager can work with the History within Act! and can have *Call* entries automatically created for calls made or received by the User when a match has been found to an entry in their Act! contacts. The contact to associate with this is found using the caller id received or dialled number.

The body of the call entry is populated with the information shown.



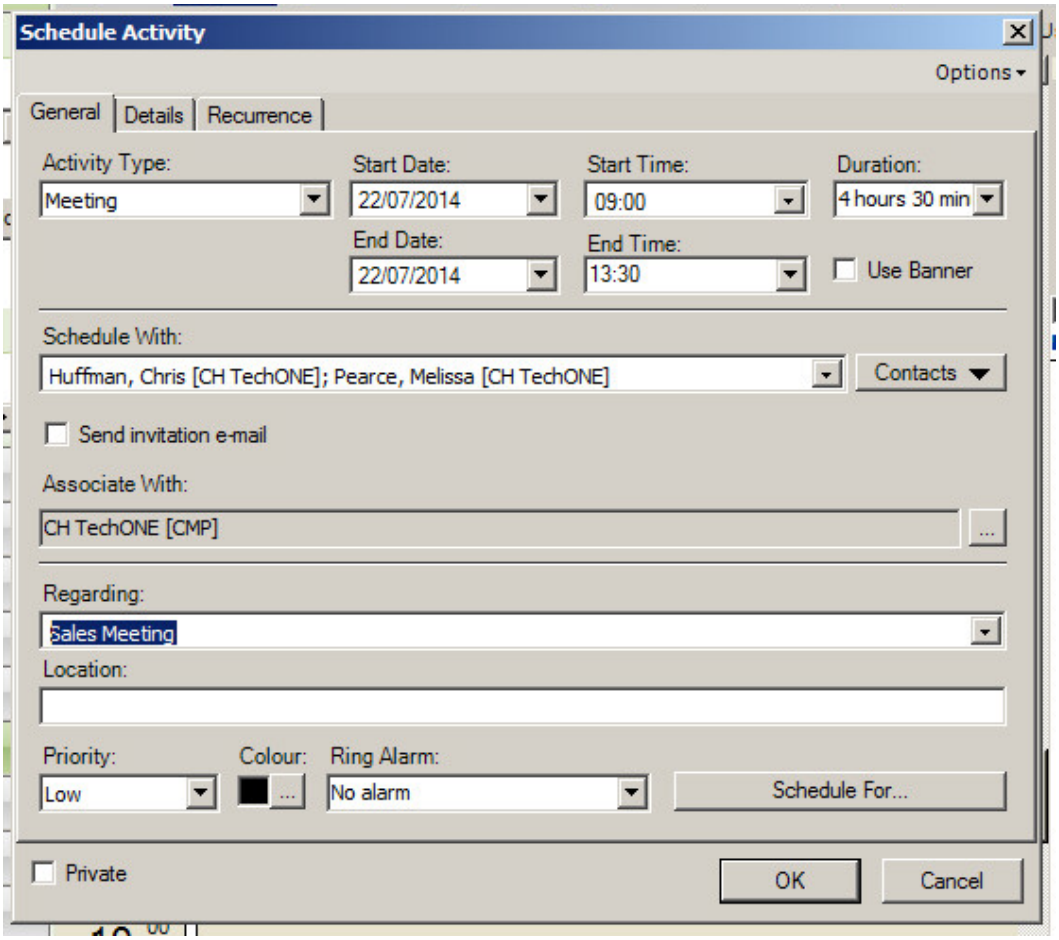
Phone number	For inbound calls this is the caller ID and for outbound calls this is the dialled number.
DDI/DID	For external inbound calls only, the DDI/DID number that the call came in on.
DDI/DID Name	For external inbound calls only, the DNIS of the DDI/DID that the call came in on.
Direction	The direction of the call.
Account Code	The account codes that was set on the call.

Trunk	For external calls the outside network trunk number that the call was made or receivec
Transferring Extension	The device that the call was transferred from.
Duration	The duration of the call. The call event trigger must have been set to Call End as they not known until the call is cleared.
Call Recording	If integrating with a Xarios Call Recorder then this can contain a URL link to the call recording (this is not a clickable hyperlink but can be copied and pasted into a browser The call event trigger must have been set to at least Call Answered as the call recorde only create the recording id when the call has been answered.

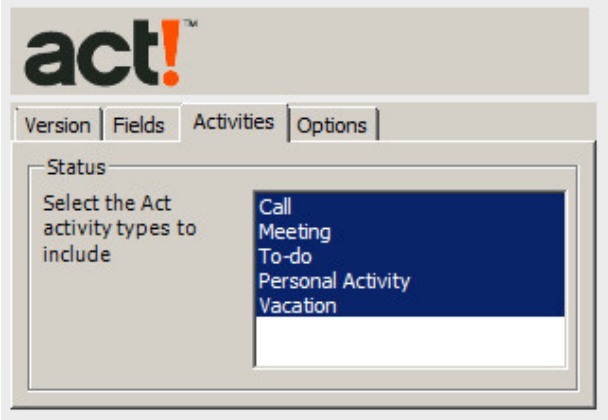
Calendar & DND synchronisation

The calendar within Act! can be synchronised with the DND status of the endpoint of the User. For example when there is an appointment in the calendar and this is due the endpoint can be automatically placed into DND with the DND text set to the *Regarding* field of the appointment. When the appointment ends, the endpoint will be automatically removed from DND.

For example the *Scheduled Activity* entry below will place the Users endpoint into DND between 09:00 and 13.30 with the DND text set to "Sales Meeting".



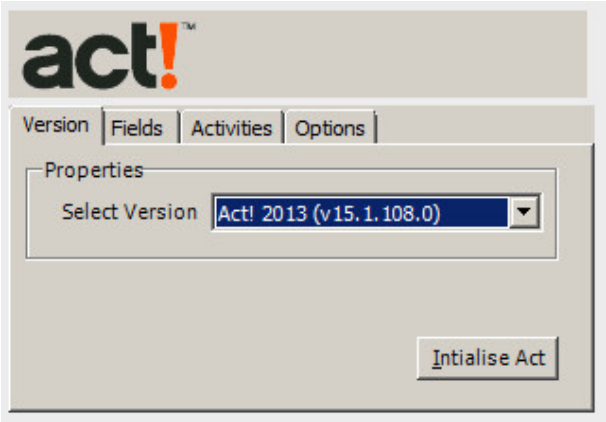
There are options to be able to select the type of *Activities* that trigger the DND change and these are configured on the *Activities* tab.



The *Options* tab has settings to control if private activities, recurring activities and all day events will be acted upon.

Configuration

The integration needs to be configured for the correct version of Act! that is running. From the *Version* tab select the relevant entry from the drop down list.



Once this has been selected the plugin needs to be initialised with the Act! application. This is performed by clicking on the *Initialise Act* button.

> Act! will need to be closed before this can be done.

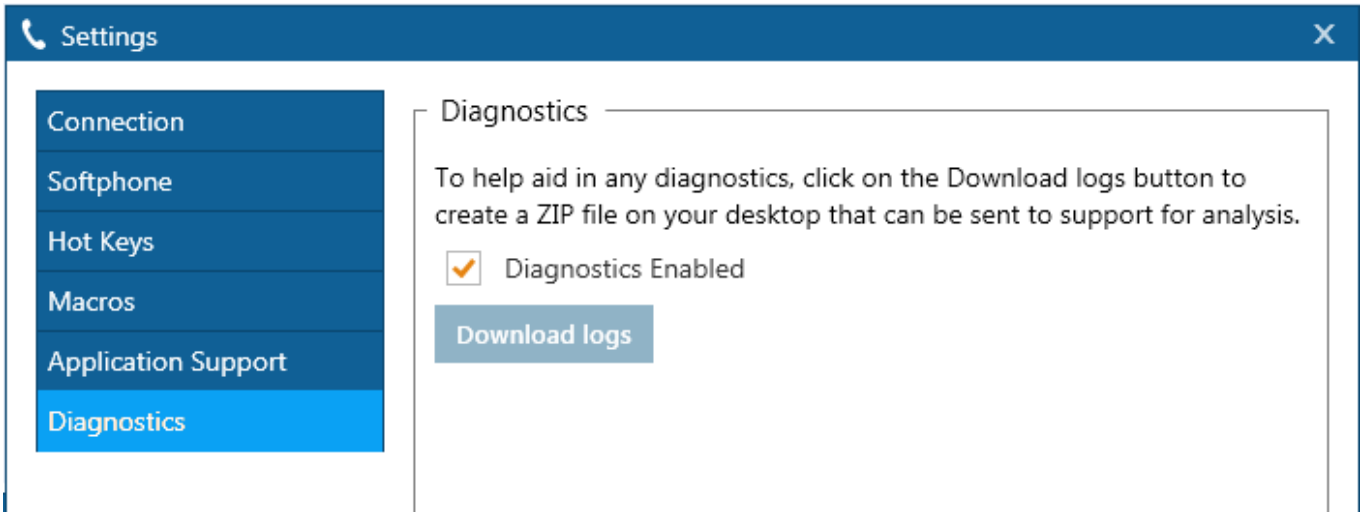
The plugin uses the Act! plugin framework and when you click *Initialise Act* the required files are copied into the Act! plugin folder. If this is not successful then the current user may not have the permissions to be able to copy files to this location. By default this is:

C:\Program Files\ACT\Act for Windows\Plugins

5.6 Diagnostics

Overview

The diagnostics section enables the Phone Manager diagnostics feature to be enabled.



Checking the **Diagnostics Enabled** option will, after a restart of the client, create logging information for this User in the folder:

%PROGRAMDATA%\Mitel\Mitel Phone Manager\logs\%USERNAME%

This should only be enabled on a temporary short term basis as it can affect the performance of the client and consume significant amount of disk space.

If you are requested to provide logging information for the client by your support team then use the **Download logs** button as this will create a ZIP file containing all the logs and configuration information required on the Users desktop that can be emailed and analysed.

6 What's New

V4.1 - Initial release

6.1 Known Issues

There are no known issues at this time.

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